

**MONTANA TOURISM  
MARKETING RESEARCH PROJECT**

**EXECUTIVE SUMMARY**

submitted to

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by

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December, 1984

## Table of Contents

Introduction.....	1
Outdoor Recreation Activities.....	3
Other Vacation or Pleasure Trip Activities.....	10
Mode of Travel.....	17
Vacation Planning.....	20
Perceptions of Montana.....	24
Familiarity with Montana.....	33
Montana Vacation Potential.....	36
Implications.....	42

## INTRODUCTION

Objectives. This report summarizes the findings of research on Montana Tourism conducted in the summer of 1984. The research was designed primarily to help identify "key" market segments of travelers most likely to visit Montana, to delineate perceptions of Montana and vacation activities associated with Montana, and to learn about vacation planning and patterns. With this information, summarized in the following pages, government agencies operating in Montana and private businesses throughout the state will be able to understand their tourism markets better by knowing what kinds of people come to Montana on vacation, what they like to do, and what they believe about Montana. From this, businesses and agencies can more effectively offer what travelers want, and promotion planners can more effectively select media and advertising themes.

The original data analysis produced literally thousands of pages of data; these were condensed into a 130 page final report submitted in October, 1984, to the Montana Travel Promotion Unit. This executive summary is a further abbreviation of the findings, so that the most important results of the study can be widely distributed and easily understood.

Background. This project was funded by the Montana Tourism Promotion Unit of the Department of Commerce. The contractor was a research team of faculty from the Department of Management at Montana State University. Working with the Travel Promotions Unit, the team constructed a telephone questionnaire and identified seven geographical regions for conducting the telephone interviews. The regions, identified in Table 1, were thought to contain people with similar interests and problems within a region, but to reflect differences among the regions. The sample of telephone numbers to call was purchased from a professional firm which specializes in creating samples. Interviewers were business students at MSU who had gone through several special training classes.

They were instructed to interview only qualified respondents--adults responsible for household vacation planning and whose households had vacationed out-of-state within the last two years or were considering such a trip. Ultimately, 1,224 usable telephone interviews were completed during July and August, 1984. Table 1 shows the number of interviews completed for each of the seven regions.

Table 1

	Interviews <u>Completed</u>
I Minnesota, Wisconsin, Eastern North and South Dakota	190
II Michigan, Indiana, Illinois	200
III Wyoming, Idaho, Western North and South Dakota	150
IV Colorado and Utah	146
V Oregon, Washington, Nevada, Northern California	189
VI Southern California, Arizona, New Mexico, West Texas	152
VII Canada-Alberta, Saskatchewan	200

Organization of this Report. The research findings summarized in this report are arranged in the following sequence:

1. Outdoor Recreation Activities - how often respondents participated
2. Vacation or Pleasure Trip Activities - what respondents reported enjoying doing while on a vacation
3. Travel Mode and Behavior - how people travel on vacation
4. Vacation Planning and Patterns - how people plan their vacations, what lead times they use, how long their vacations are.
5. Perceptions of Montana - attitudes, beliefs, and opinions of Montana
6. Familiarity - degree of familiarity with Montana
7. Montana Vacation Potential - chances of visiting Montana, with demographic profiles



## OUTDOOR RECREATION ACTIVITIES

Respondents were asked how frequently they engaged in several outdoor activities, all of which are available in Montana. Figures 1 through 8 report the frequency of participation in outdoor recreation activities. Note that over half the respondents reported "sometimes" or "often" engaging in fishing (57.8%), spending time at the beach (56.3%), camping (53.1%), and boating, canoeing, or rafting (50.7%).

Fishing was the most popular outdoor activity (Figure 1). Lake and river fishing were much more popular than ocean fishing. Fishing was most popular among respondents in the Rocky Mountain region, and least popular among Canadian respondents (who were, incidentally, all urban residents), and those in the Southwest. Respondents who fished "often" were more apt than those who do not fish to go camping, hunting, boating, and to visit national or state parks, and less likely to visit big cities while on vacation. Respondents who fished "often" tended to be male, younger, blue-collar workers, with larger families, and to live in rural areas. Finally, respondents who reported fishing "sometimes" or "often" were asked to rate Montana as a place to fish. Over half (50.8%) rated Montana as "excellent," and an additional 40.5% rated Montana "good."

The popularity of spending time at the beach is reported in Figure 2. With most outdoor activities, proximity to the places where the activities are done was a major factor in the frequency of participation. Thus spending time at the beach was least frequent among Colorado and Utah respondents and more frequent with those on the West Coast. Surprisingly, the Canadian sample, from Alberta and Saskatchewan, had the highest frequency. Those who reported spending time at the beach were asked to rate Montana as a place to spend time at the beach. Only 26.1% rated Montana as "good" or "excellent" for spending time at the beach.

Campers (Figure 3). Camping was the third most popular activity with 53.1% of the sample responding "often" or "sometimes." Tent camping was most popular; 61.8% of the campers reported using a tent; 38.9% reported using a camper; and 24.6% said they used a recreational vehicle. (Note: This adds to more than 100% because some campers used more than one of those means.) Camping was most popular among respondents in the nearby Rocky Mountain Regions of Colorado, Utah, Wyoming, Idaho, and the Western Dakotas, and least popular in the two Midwest regions. Campers reported greater participation (than non-campers) in all of the other outdoor activities considered in this report. This difference was especially marked for fishing, hunting, and boating. Campers also were more apt to visit state or national parks, historic places, and night clubs. Campers were active travelers--they tended more than non-campers to travel long distances when vacationing and were less apt to travel with a group tour. Campers rated Montana positively as a place to camp with, 95.3% rating it "good" or "excellent." Those who camped "often" differ from non-campers in that they were more likely to be single, younger, and in a middle income range (\$20,000 - \$40,000 annual household income).

Those who reported boating, canoeing, or rafting "sometimes" or "often" (Figure 4) were asked about these three activities separately. Over four in five, (81.2%) reported boating, 32.7% said that they canoed, and 26.5% said they went rafting. Additionally, over 80% of these respondents rated Montana as "good" or excellent" as a place to enjoy boating, canoeing, or rafting. These activities were most popular among respondents in the two Midwest regions, and least popular in the Southwest. Canoeing was most popular in the Midwest, and rafting in the Northwest and Colorado/Utah.

Of those reporting hiking, climbing, or backpacking "sometimes" or "often" (Figure 5), 93% said they hiked, 50% said they backpacked, and 25% said they went climbing. When asked, two-thirds replied that they preferred to seek

wilderness areas for these activities. Hiking, climbing, and backpacking were most popular among respondents in Colorado/Utah and the Northwest, and least popular in the Michigan, Indiana, and Illinois region.

Montana was rated very highly as a place to enjoy these activities. Among respondents who reported hiking, climbing, or backpacking "sometimes" or "often;" 69.5% rated Montana "excellent" for their activities, and an additional 26% rated it "good."

Skiing (Figure 6) was participated in "sometimes" or "often" by about one-third of all respondents; of these 78.1% reported downhill (alpine) skiing and 37.1% reported cross-country (Nordic) skiing. Skiing was most popular among respondents from Colorado/Utah and Canada, and least popular in the far Midwest region of Michigan, Indiana, and Illinois. Almost 45% of those sampled in Colorado/Utah and Canada "sometimes" or "often" engaged in skiing. Cross-country skiing was more popular in Minnesota, Wisconsin, the Eastern Dakotas and Canada. Downhill skiing was more popular in the four Western regions. (The biggest surprise perhaps, was that people in the Southwest engaged in downhill skiing as much as the Canadian sample and those in the Western States, and considerably more than those in the two Midwestern regions.)

Even though skiing was not one of the more popular outdoor activities overall, skiers are an important group to consider because they come during the "off" season and because their sport is an expensive one. More than non-skiers, skiers were found to be more active in all outdoor activities except fishing. Skiers reported more resort visits and were more apt than non-skiers to play golf, visit parks, go to night clubs and go out of their way to dine at fine restaurants while on vacation. Over half the skiers (50.5%) rated Montana as "excellent" for skiing, and an additional 38.9% rated it "good."

Hunting was popular with relatively few respondents (Figure 7). The most active hunters came from Wyoming, Idaho and the Western Dakotas. Hunting was least popular among respondents in the Southwest and Canada. When asked, three hunters in five (59.7%) reported bird hunting, 80.5% reported deer hunting, and 42.5% reported hunting other big game. Montana's highest rating was given by hunters 71% of whom rated Montana as an "excellent" place to hunt. An additional 24% rated it "good."

Snowmobiling was the least popular of the outdoor recreation activities. Figure 8 reveals that only 12.5% of respondents--fewer than one in seven--went snowmobiling "sometimes" or "often." As would be expected, snowmobiling was most popular in the Northern regions of the sample. Snowmobilers gave high marks to Montana as a place for their sport; 45.5% rated Montana as "excellent" for snowmobiling, and another 31.8% rated it "good."

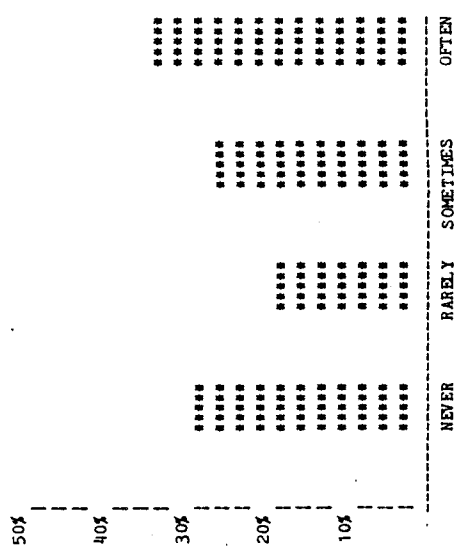


FIGURE 1

HOW OFTEN DO YOU OR MEMBERS OF YOUR FAMILY...  
GO FISHING

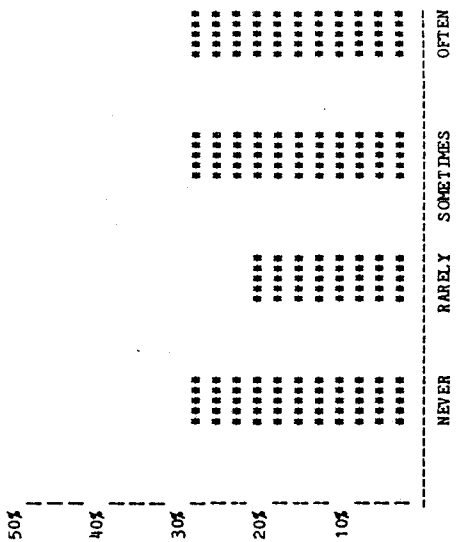


FIGURE 3

HOW OFTEN DO YOU OR MEMBERS OF YOUR FAMILY...  
GO CAMPING

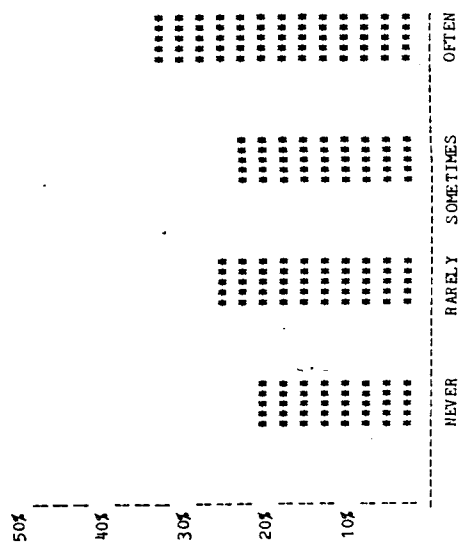


FIGURE 2

HOW OFTEN DO YOU OR MEMBERS OF YOUR FAMILY...  
SPEND TIME AT THE BEACH

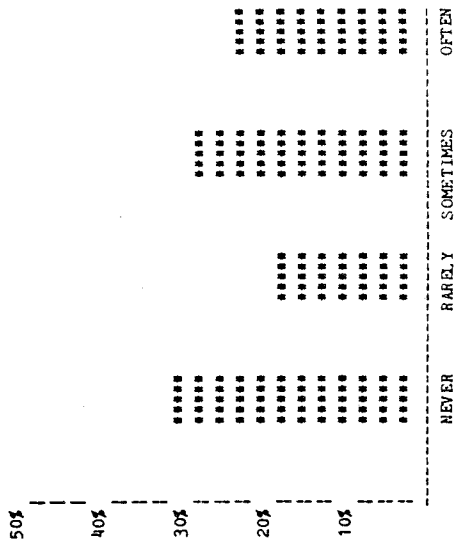


FIGURE 4

HOW OFTEN DO YOU OR MEMBERS OF YOUR FAMILY...  
GO BOATING, CANOEING OR RAFTING

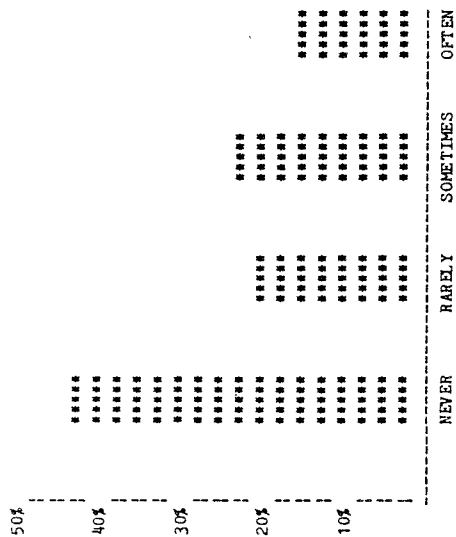


FIGURE 5  
HOW OFTEN DO YOU OR MEMBERS OF YOUR FAMILY...  
GO HIKING, CLIMBING OR BACKPACKING

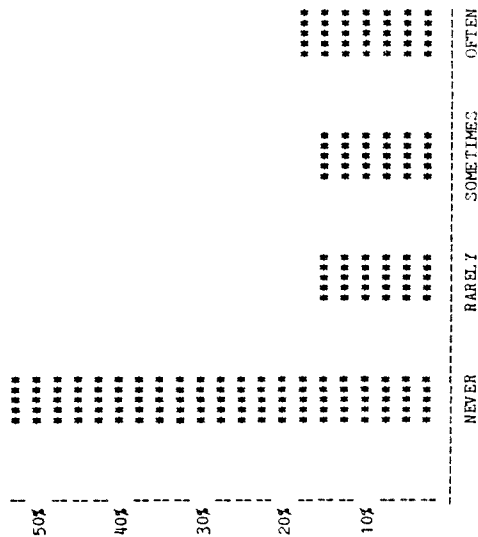


FIGURE 6  
HOW OFTEN DO YOU OR MEMBERS OF YOUR FAMILY...  
GO SKIING

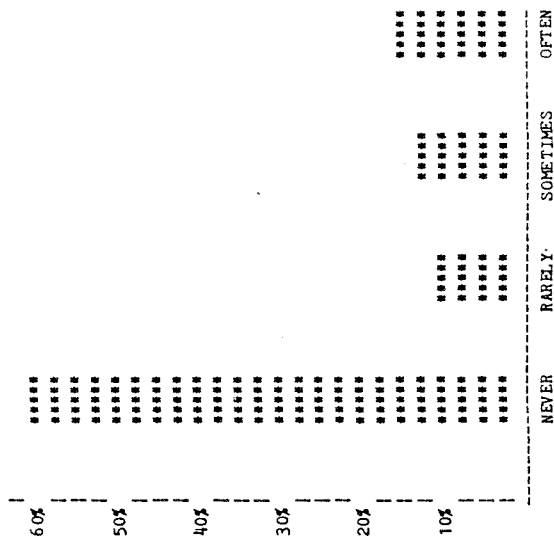


FIGURE 7  
HOW OFTEN DO YOU OR MEMBERS OF YOUR FAMILY...  
GO HUNTING

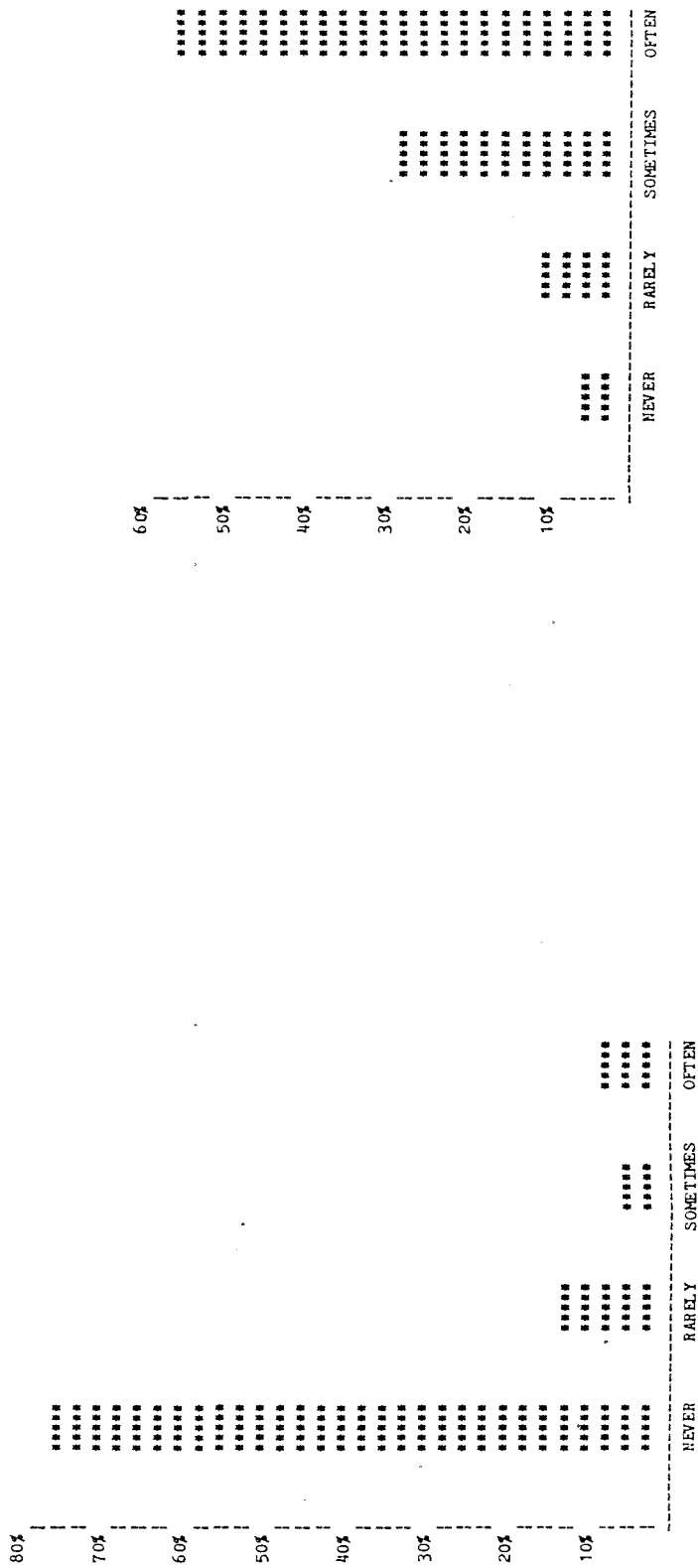


FIGURE 8  
HOW OFTEN DO YOU OR MEMBERS OF YOUR FAMILY...  
GO SNOWMOBILING

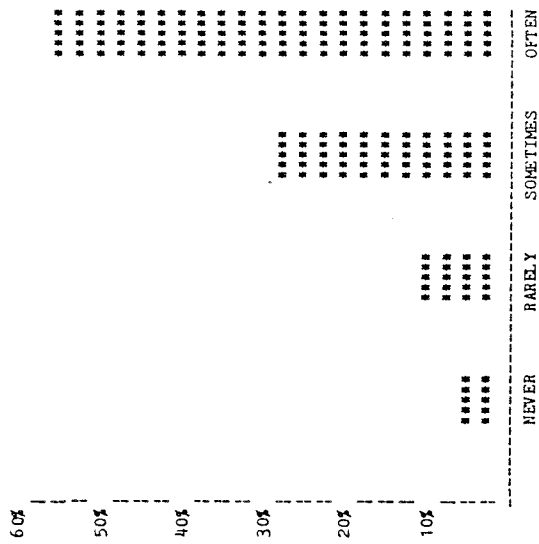


FIGURE 9  
HOW OFTEN DO YOU OR MEMBERS OF YOUR FAMILY...  
TRAVEL JUST TO SIGHTSEE

## OTHER VACATION OR PLEASURE TRIP ACTIVITIES

The popularity of a number of vacation or pleasure trip activities is reported in Figures 9 through 17. Note that by far the most popular activity is traveling to sightsee (Figure 9); 84.1% of all respondents reported "traveling just to sightsee" sometimes or often. This figure was similar across all regions of the sample. These respondents were asked to rate Montana as a place to sightsee; 36.8% rated Montana "excellent," and an additional 43.6% rated it "good."

Another very popular vacation activity with relevance for Montana was visiting national or state parks. Over three-fourths (77.6%) of all respondents reported visiting national or state parks "sometimes" or "often" while vacationing (Figure 10). This activity was most popular among respondents in the Western regions and Canada -- areas with many major parks. Those who reported sometimes or often visiting national or state parks were asked to rate Montana as a place to do this; 35.7% rated Montana "excellent," and another 57.1% rated it "good."

Park visitors, those respondents who reported visiting national or state parks "sometimes" or "often" while vacationing, were more active than non-visitors in all outdoor activities studied except snowmobiling and spending time at the beach, and in all other vacation-related activities except seeking fine restaurants or playing golf. Park visitors also were more apt to travel by car when vacationing, and to travel long distances. They also tended more to read books and articles about vacation possibilities, to discuss their plans with friends, and to plan their itinerary further in advance.

Families with more children tend to be more active users of national and state parks and those over 60 less active users. In general, the more frequent visitors to national and state parks estimated a greater probability of visiting Montana than did non-visitors.



Visiting Historic Places was an activity which over three-fourths of all respondents (75.2%) reported doing "sometimes" or "often" while on vacation (Figure 11). These respondents were asked about Montana's historic places; 23.3% rated Montana as "excellent" and an additional 55.8% rated it "good" with respect to historic places.

"Historians," those who visit historic places "sometimes or often," reported camping and hiking more than non-historians, but less skiing and snowmobiling. Predictably, historians reported more visits to museums while vacationing, travel for sightseeing, visiting national or state parks, and visits to big cities. Historians sought fine restaurants and showed less interest in golf and night clubs. They also were slightly more apt than non-historians to travel long distances on vacation.

In terms of how vacation plans were made, historians read travel books or articles, used travel agents, and sought friends' advice more frequently than non-historians. Historians tended to be older and female.

The next most popular vacation activity was seeking fine restaurants (Figure 12). Nearly two-thirds of all respondents (65.4%) reported "sometimes" or "often" seeking fine restaurants while vacationing. This activity was least popular among residents of Wyoming, Idaho, and the Western Dakotas. Montana was not noted for its fine restaurants; only 9.2% of those who "sometimes" or "often" sought out fine restaurants rated Montana as "excellent" in this respect, while another 46.2% rated it "good."

Visiting Museums was a vacation activity which over three respondents in five (62.9%) reported doing "sometimes" or "often" (Figure 13). These respondents were asked to rate Montana as a place to visit museums; 17.5% rated it "excellent," and 40.0% rated it "good." There appear to be no distinguishing characteristics (i.e., age, income, etc.) held in common by active museum visitors.

Over half the respondents (52.9%) reported visiting a resort "sometimes" or "often" while on vacation (Figure 14). Skiers were more apt than any other group (e.g., fishermen) to stay at a resort. About one resort visitor in five rated Montana as "excellent" (19.7%), while 54.9% rated it "good" as a place to visit a resort. Canadians were the most frequent resort visitors. Resort visits were least popular among respondents from Wyoming, Idaho, and the Western Dakota region.

Respondents who reported that they "sometimes" or "often" visited resorts while on vacation were asked what resort activities they engaged in. Many different activities were reported, ranging from visiting amusement parks to playing shuffleboard. The twelve most frequently mentioned activities are listed in Table 2.

TABLE 2  
MAJOR RESORT ACTIVITIES

<u>Activity</u>	<u>Frequency</u>	<u>Percent of Activities</u>
Swim	163	25.8
Relax	73	11.6
Ski	49	7.8
Fish	47	7.5
Golf	45	7.1
Boat	28	4.4
Tennis	26	4.1
Sightsee	23	3.6
Camp	16	2.5
Beaches	16	2.5
Suntan	15	2.4
Dining and Dancing	15	2.4
Other	<u>115</u>	<u>18.2</u>
Total	631	100.0%

Over half the respondents also reported that they traveled to see big cities (Figure 15) "sometimes" or "often" on vacation (51.6%). This activity was most popular among Canadian respondents and least popular among those in the Wyoming, Idaho, and the Western Dakota regions. As expected, Montana was not viewed as a

place to visit big cities. Of those who visit big cities "sometimes" or "often" on vacation, only 6.6% rated Montana as "excellent," and another 8.2% rated it "good."

Two respondents in five (41.9%) reported visiting night clubs "sometimes" or "often" while vacationing (Figure 16). This activity was least popular in the Rocky Mountain and Northwest regions and significantly more popular among respondents in the other regions. Night club visitors were asked to rate Montana as a place to visit night clubs; 21.1% rated it "excellent," and an additional 26.3% rated it "good."

The least popular vacation activity in the study was playing golf (Figure 17). Slightly more than one respondent in four (28.2%) reported playing golf "sometimes" or "often" while on vacation. Golfing was most popular among Canadian respondents. While only 15.0% of golfers rated Montana "excellent" as a place to play golf, an additional 52.5% rated it "good."

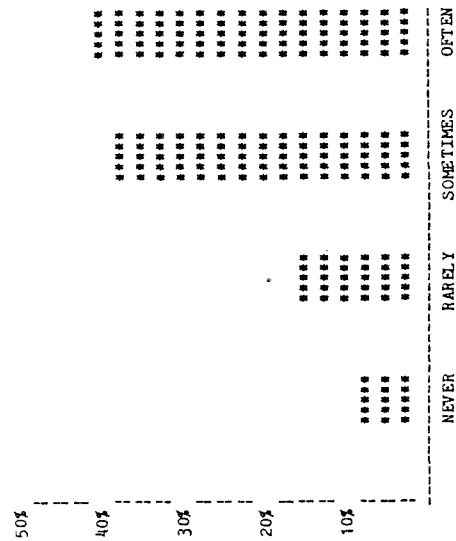


FIGURE 10

WHEN VACATIONING,  
HOW OFTEN DO YOU OR MEMBERS OF YOUR FAMILY...  
VISIT NATIONAL OR STATE PARKS

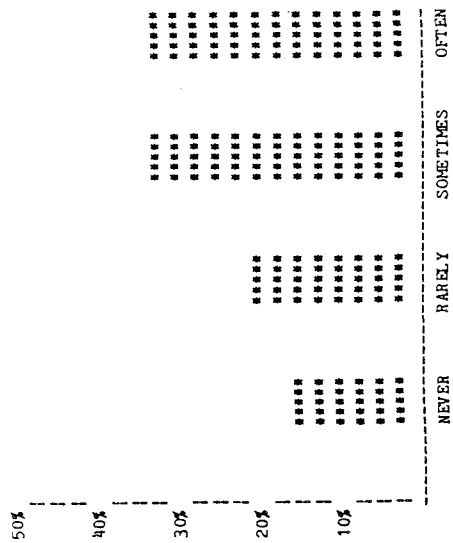


FIGURE 12

WHEN VACATIONING,  
HOW OFTEN DO YOU OR MEMBERS OF YOUR FAMILY...  
SEEK OUT FINE RESTAURANTS

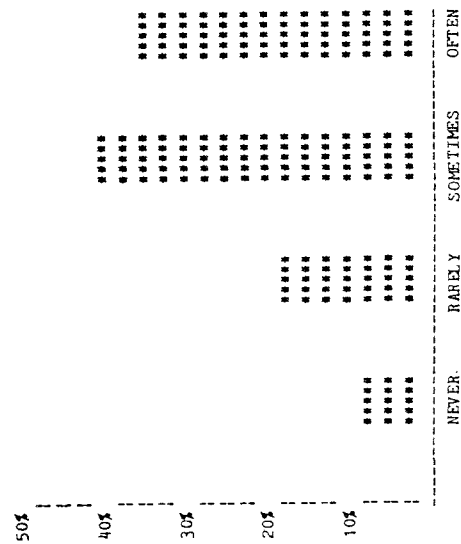


FIGURE 11

WHEN VACATIONING,  
HOW OFTEN DO YOU OR MEMBERS OF YOUR FAMILY...  
VISIT HISTORIC PLACES

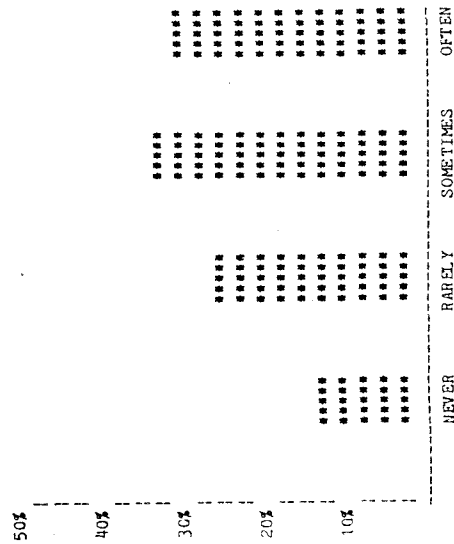


FIGURE 13

WHEN VACATIONING,  
HOW OFTEN DO YOU OR MEMBERS OF YOUR FAMILY...  
VISIT MUSEUMS

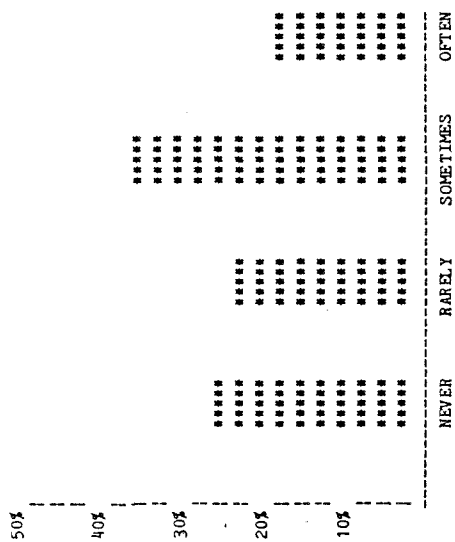


FIGURE 14

WHEN VACATIONING,  
HOW OFTEN DO YOU OR MEMBERS OF YOUR FAMILY...  
VISIT A RESORT

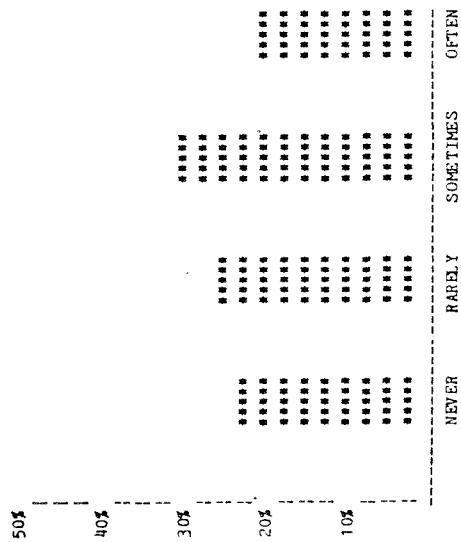


FIGURE 15

WHEN VACATIONING,  
HOW OFTEN DO YOU OR MEMBERS OF YOUR FAMILY...  
TRAVEL TO SEE BIG CITIES

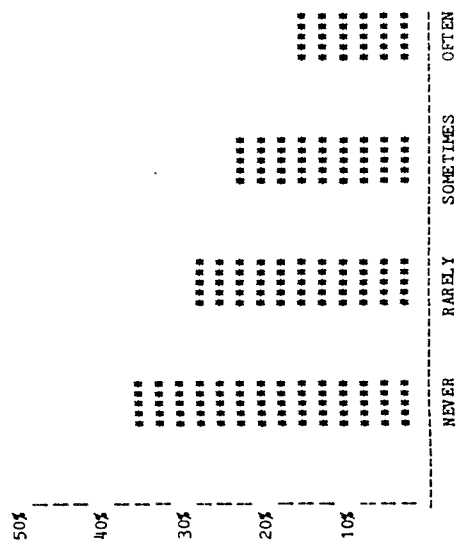


FIGURE 16

WHEN VACATIONING,  
HOW OFTEN DO YOU OR MEMBERS OF YOUR FAMILY...  
GO TO NIGHT CLUBS

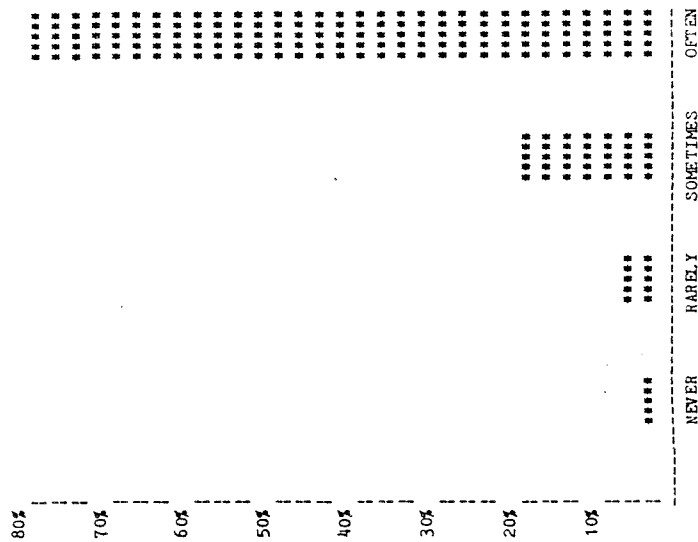


FIGURE 17  
WHEN VACATIONING,  
HOW OFTEN DO YOU OR MEMBERS OF YOUR FAMILY...  
PLAY GOLF

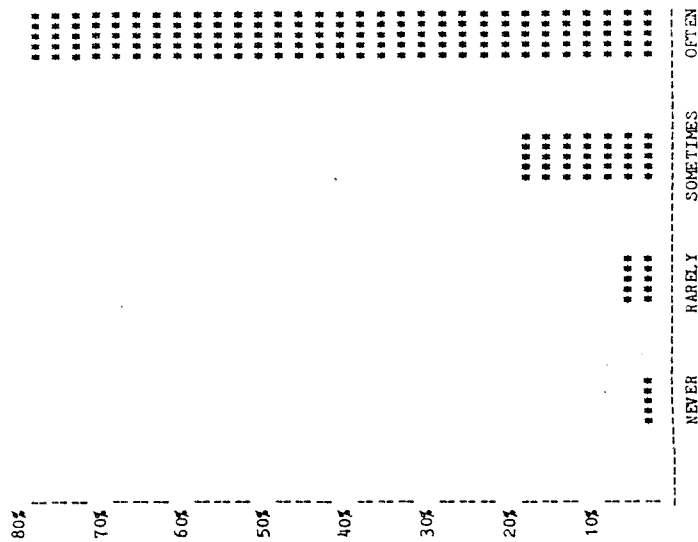


FIGURE 18  
WHEN VACATIONING,  
HOW OFTEN DO YOU OR MEMBERS OF YOUR FAMILY...  
TRAVEL BY CAR

## MODE OF TRAVEL

The study also explored how far people traveled on vacation, and the mode of travel they used. Figures 18 through 22 report the popularity of traveling on vacations by car, air, motorcycle, bus, or train, respectively. Note that easily the most popular mode is by car (Figure 18) with almost four respondents in five (78.1%) "often" traveling this way. Also, however, note that almost three respondents in ten (29.1%) reported "often" traveling by air, and another 30% "sometimes" traveling by air. Respondents from Canada and the Southwest were the most frequent air travelers, with 72% traveling by air "sometimes" or "often." The lowest incidence of air travel was among respondents from Wyoming, Idaho, and Western Dakota with only 43% traveling by air "sometimes" or "often."

Respondents also were asked how often they traveled long distances on vacation. Figure 23 reveals that more than two respondents in five (41.6%) reported "often" traveling long distances, and an additional 41.9% "sometimes." Canadian respondents were slightly more apt than others to travel long distances on vacation. The overall willingness of most respondents to travel long distances is encouraging given Montana's relative distance from major population centers.

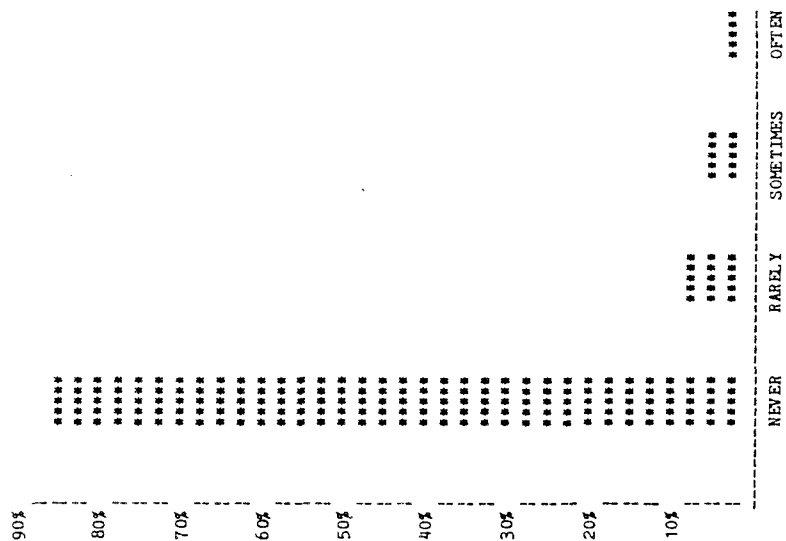


FIGURE 19

WHEN VACATIONING,  
HOW OFTEN DO YOU OR MEMBERS OF YOUR FAMILY...  
TRAVEL BY AIR

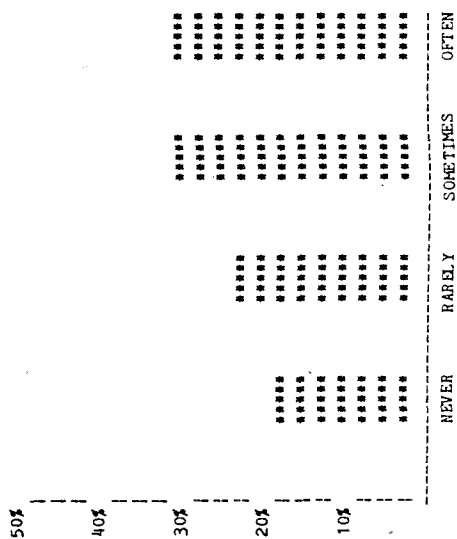


FIGURE 20

WHEN VACATIONING,  
HOW OFTEN DO YOU OR MEMBERS OF YOUR FAMILY...  
TRAVEL BY MOTORCYCLE



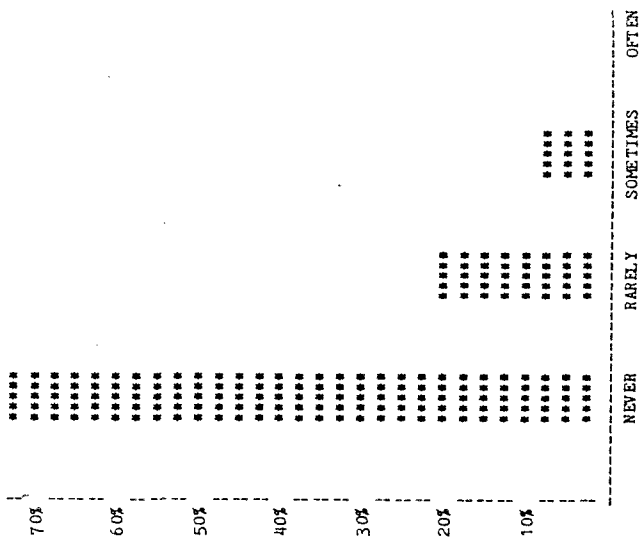


FIGURE 21  
WHEN VACATIONING,  
HOW OFTEN DO YOU OR MEMBERS OF YOUR FAMILY...  
TRAVEL BY BUS

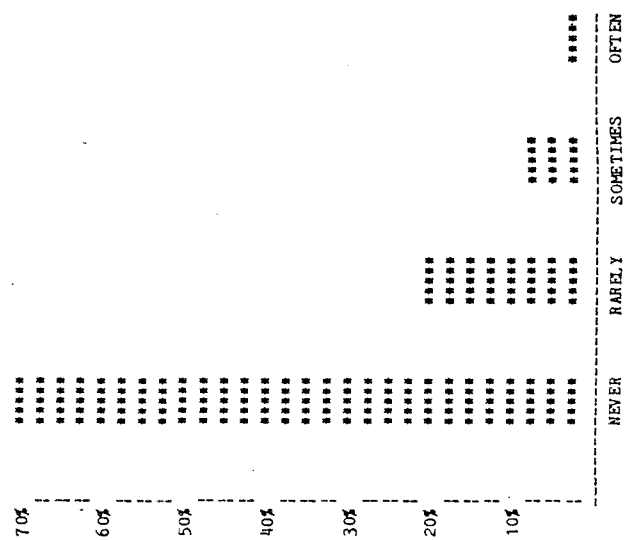


FIGURE 22  
WHEN VACATIONING,  
HOW OFTEN DO YOU OR MEMBERS OF YOUR FAMILY...  
TRAVEL BY TRAIN

## VACATION PLANNING

A number of questions were asked about how respondents planned their vacations, what sources were used for information, and how far in advance vacation plans were made. One question of interest regarded respondents' use of travel agents. Figure 24 reveals that approximately one respondent in five (19.8%) "often" used travel agents, and that an additional 26.6% used them "sometimes." Use of travel agents was about the same in all regions except Wyoming, Idaho, and Western Dakota, where respondents reported using them less.

Those who reported using the services of travel agents "sometimes" or "often" were asked whether they used the agents to help decide where to go and/or how to get there. While only 6.3% of those who use travel agents do so to determine where to go, nearly two-thirds (65.2%) use them to determine how to get to their destinations; 28.4% use them for both purposes.

Respondents also were asked whether they traveled in group tours; only one respondent in twenty (4.6%) reported "often" traveling in this manner, and another 10.9% said they "sometimes" traveled in group tours.

Both seeking friends' advice and reading books or articles about vacation places were popular information sources for respondents. Figure 25 reports that almost half (49.6%) of all respondents "often" sought friends' advice about vacation places, and an additional third (32.2%) "sometimes" did. This underscores the importance of having Montana visitors satisfied with their experience so they will recommend a Montana vacation to their friends. Also, Montana residents can influence their out-of-state friends to vacation here.

Another popular information source was reading books or articles about vacation places which 43.2% of respondents reported doing "often" and another 35.7% "sometimes" (Figure 26). This underscores the importance of magazine articles and other media features about Montana, and of efforts to encourage magazines to write such articles.

The study also asked respondents whether they wrote or called state agencies for assistance in vacation planning. About two-thirds (63%) reported that they did not, and one-third (37%) said that they did. The information from state agencies was used more to determine what to do in a state (80.6% of those contacting state agencies) but 45% used this information to determine which states to visit.

Respondents were asked how far in advance they planned vacations. Figure 27 depicts vacation planning lead times. While it doubtless is true that longer, more distant vacations (such as assumed to characterize a Montana vacation) require relatively longer lead times, still, one-third of the respondents reported planning the vacation one month or less in advance of actually traveling. By contrast, only 10.7% of all respondents reported planning them more than six months in advance.

The study also asked respondents to report how many out-of-state vacations they had taken in the past three years. Responses ranged from none (5.0%) to the case of an airline steward who reported 120, and averaged 4.0 or slightly more than one per year. Respondents from Colorado and Utah averaged more than five trips, while the near Midwest region of Wisconsin, Minnesota, and the Eastern Dakotas averaged 3.41 vacations. Predictably, the average number of summer vacations, 2.6, exceeded the average number taken in the winter, 1.4. Respondents from Colorado and Utah took more winter vacations.

Out-of-state vacations ranged from one day in length to six months, and averaged 14.8 days. Figure 28 depicts length of time respondents were away from home on their last out-of-state vacation. Note that over one-third of vacations (34.4%) were one week or less, approximately two in five (41.0%) lasted between eight days and two weeks and approximately one-fourth (24.7%) lasted more than two weeks.



FIGURE 23

FIGURE 25

WHEN PLANNING VACATIONS,  
HOW OFTEN DO YOU OR MEMBERS OF YOUR FAMILY...  
SEEK FRIENDS' ADVICE



FIGURE 24

FIGURE 26

WHEN PLANNING VACATIONS, HOW OFTEN DO YOU OR MEMBERS  
OF YOUR FAMILY READ BOOKS OR ARTICLES  
ABOUT PLACES YOU ARE CONSIDERING GOING

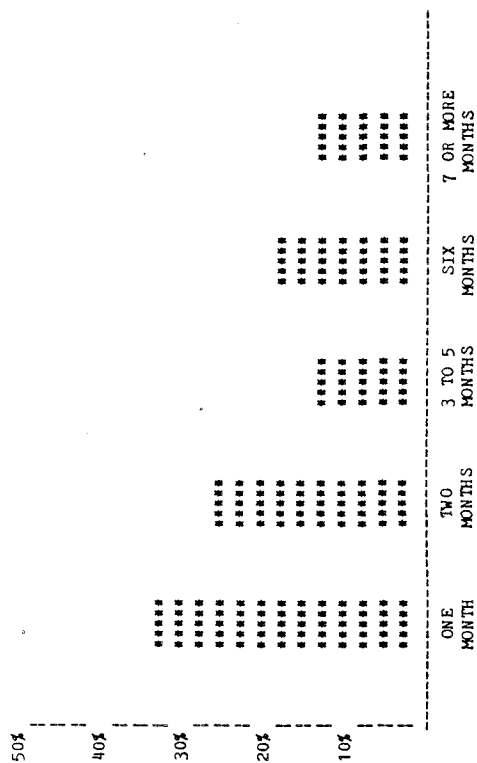


FIGURE 27

DESTINATION DECISION MONTHS IN ADVANCE

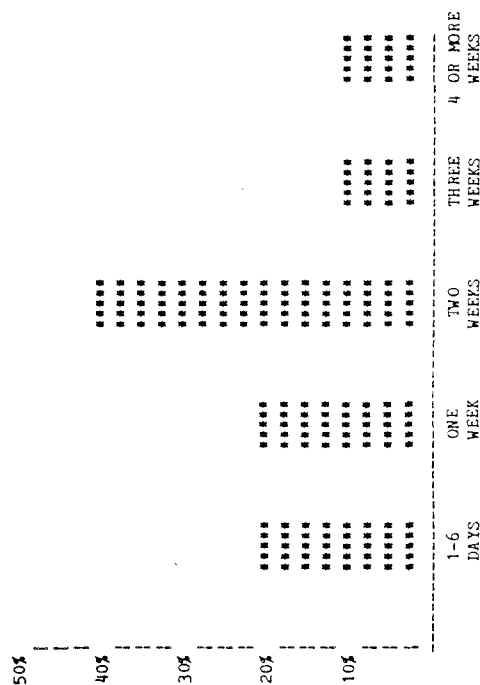


FIGURE 28

TIME AWAY FROM HOME ON LAST VACATION

## PERCEPTIONS OF MONTANA

A very interesting aspect of the study was discovering what respondents believed Montana to be like. First, respondents were asked to rate Montana on a number of vacation-related features (e.g., rate Montana as a scenic place to visit) and to respond with "poor," "fair," "good," "excellent," or "don't know." During part of the data generation period, respondents expressing no familiarity with Montana were not asked to rate it on these features. Further, when a respondent appeared bored or frustrated by not having an opinion on Montana for several features in a row, interviewers were instructed to skip to the next section of the questionnaire. Thus, not all respondents rated Montana on these features; those who did not may be assumed to be less familiar with Montana than those who did respond. Table 3 reports the percentage of the sample who were able to rate Montana on the 13 vacation-related features. A significant point is the percentage of respondents who were unable to rate Montana. This agrees with the previous findings which suggest that Montana lacks an image in the minds of a large number of potential vacationers.

TABLE 3

Percentages of Respondents Providing an Opinion  
About Montana Vacation Activities

<u>Ratings of Montana as a Place</u>	<u>% of Those Responding Who Gave A Rating (Poor Fair, Good, Excellent)</u>	<u>% of Those Responding Who Answered Don't Know</u>
Scenic Place To Visit	77.7	22.3
Good Dollar Value	49.9	50.1
Friendly People	74.2	25.8
Historical Sites	65.3	34.7
Enjoy Outdoor Rec	88.4	11.6
Variety of Vacation Activities	73.4	26.6
Good Restaurants	48.4	51.6
Family Vacation	87.7	12.3
Hotels and Motels	44.3	55.7
Climate	88.7	11.3
Rest/Relax	90.5	9.5
Easy to Get to	93.6	6.4
Overall Vac Place	79.0	21.0

In order to get a clearer idea of what respondents who could rate Montana thought about the state's vacation potential, those who answered "don't know" or who skipped the question were eliminated and the percentage of the remainder who rated the state "poor", "fair", "good" or "excellent" was computed. The results are contained in Figures 29 through 41.

There appears to be a quite favorable impression of Montana on several of the features in these tables. Over 90% rated Montana to be either "good" or "excellent" as a place to enjoy outdoor activities (95.4%), as a place for family vacations (90.6%), as a place to rest and relax (92%), and as a place with friendly people (91.7%). Even the feature that produced the least favorable ratings of Montana, climate (as expected), was still considered "good" or "excellent" by two-thirds (66.9%) of the 776 respondents who provided a rating. Consistent with the findings of earlier studies are the relatively low ratings for Montana's hotels, motels, and restaurants. Finally, note that

80.1% rated Montana as "good" or "excellent" as an overall place to take a vacation (Figure 41).

As a further measure of the perceptions which exist about Montana, respondents were asked two types of open ended questions. In the first of these, they were asked to provide three words that came to mind when they thought of Montana. Several interesting findings resulted. First, the sample was by no means able to provide three words in every case. Each of the 1225 respondents was asked for three words, for a total of 3675 possible associations. Of this total, 1095 were left blank because the respondent couldn't come up with three (and in some cases couldn't come up with any) responses. This suggests that Montana's image is still not fully articulated in the minds of consumers. Among the responses that were elicited, the following were mentioned by more than 5% of the sample:

<u>Category</u>	<u>% Mentioning</u>
Pretty/Scenic/Beautiful	36.4
Big/Desolate/Open/Barren	25.8
Big Mountains	18.2
Cold	9.9
Blue Sky/Big Sky/ God's Country	7.7
Wooded/Lots of Trees	6.5
Remote/Rural/Few People	6.1

Based on these responses, Montana's overall image seems to be related primarily to the natural grandeur of the state. Further, the negative perceptions that were elicited (barren, remote, desolate and cold) seem inseparable from the positive aspects (big sky, God's country, pretty, scenic).

There were some regional differences in the free associations. Residents of bordering states, along with the Southwest, saw Montana as relatively more wooded. Canadians saw Montana as plains and prairie but liked the skiing,



fishing, and people better than the American sample. Canadians rarely mentioned trees or cold.

Respondents were also asked what they might enjoy most and least about a vacation in Montana. More than 5% of the sample mentioned the following:

<u>What They Would Enjoy Most</u>	<u>% Mentioning</u>
Scenery/Beauty	22.8
Fishing	9.0
Mountains	8.0
Getting Away	6.4

Respondents who gave an answer (6.6% could not think of anything they would enjoy) tended to focus on the outdoor recreational aspects of the state.

When asked what they would like least, more than 5% of the sample mentioned:

<u>Would Like Least About A Montana Vacation</u>	<u>% Mentioning</u>
Long Drive/Distance to Montana	12.1
Cold Winter	10.7
Sparse/Barren	5.1
Nothing to Do/Boring	5.0

Almost half (46.3%) were unable to name a single drawback to a Montana vacation. Again, there were regional differences in response to both the best and worst aspects of a Montana vacation.

Residents of Michigan, Illinois, and Indiana mentioned fishing twice as often as respondents from other regions, and they were responsible for six of the seven total mentions of horses or riding. Residents of Region 3 (Wyoming, Idaho, and Western Dakotas) were more apt to mention the "outdoors." Finally, Canadians (Region 7) mentioned skiing far more times (27) than any other region;

(a distant "second" was the Northwest, with 10). Canadians also made five of the eight total references to "friendly people" in Montana.

Thirty-two respondents, all Canadians, said the strength of the U.S. dollar against Canadian currency was what they liked least about Montana.

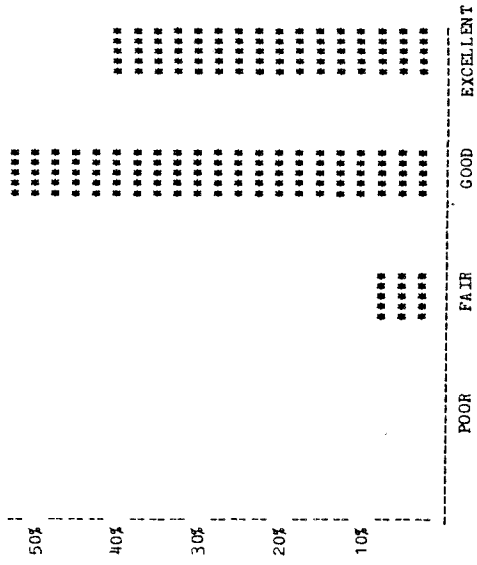


FIGURE 29

HOW WOULD YOU RATE MONTANA AS A  
SCENIC PLACE TO VISIT

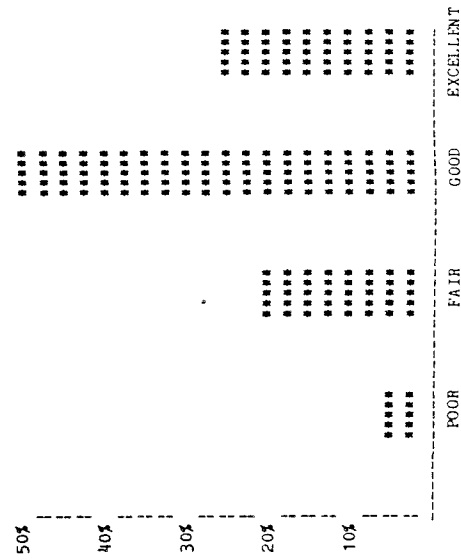


FIGURE 30

HOW WOULD YOU RATE MONTANA AS A PLACE  
TO GET GOOD VALUE FOR YOUR VACATION DOLLAR

FIGURE 31

HOW WOULD YOU RATE MONTANA AS A PLACE  
WITH FRIENDLY PEOPLE

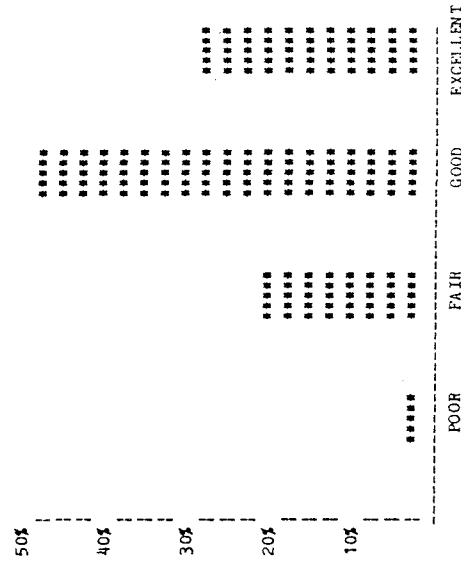


FIGURE 32

HOW WOULD YOU RATE MONTANA AS A PLACE  
WITH INTERESTING HISTORICAL SITES

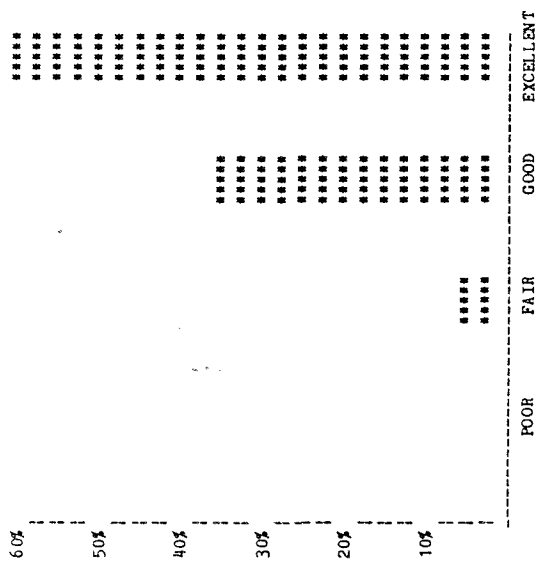


FIGURE 33  
HOW WOULD YOU RATE MONTANA AS A PLACE  
TO ENJOY OUTDOOR RECREATION

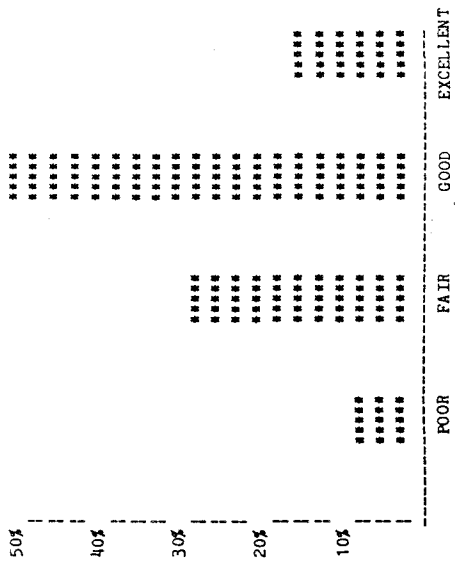


FIGURE 35  
HOW WOULD YOU RATE MONTANA AS A PLACE  
WITH GOOD RESTAURANTS

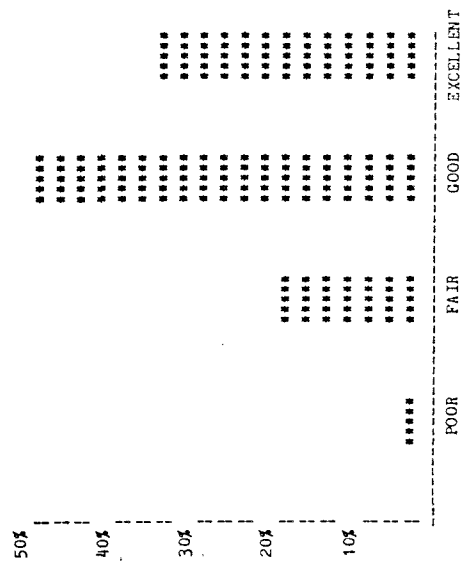


FIGURE 34  
HOW WOULD YOU RATE MONTANA AS A PLACE  
WITH A VARIETY OF VACATION ACTIVITIES

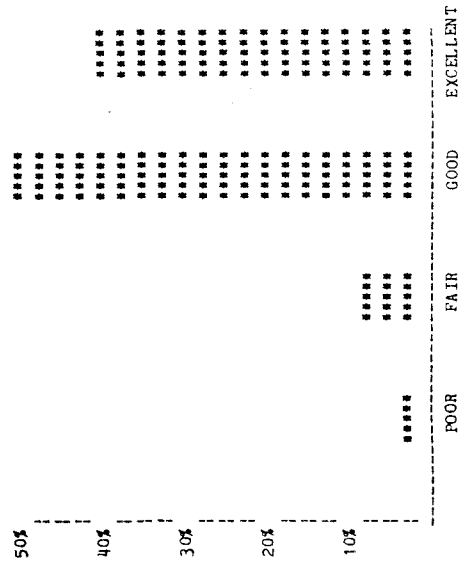


FIGURE 36  
HOW WOULD YOU RATE MONTANA AS A PLACE  
FOR A FAMILY VACATION



FIGURE 38  
HOW WOULD YOU RATE MONTANA'S  
CLIMATE

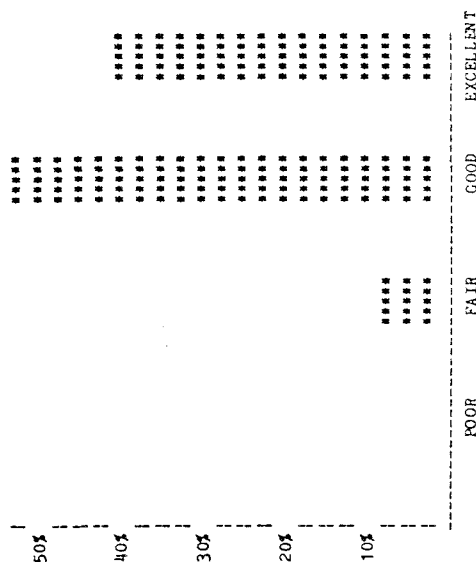


FIGURE 39  
HOW WOULD YOU RATE MONTANA AS A PLACE  
FOR REST AND RELAXATION

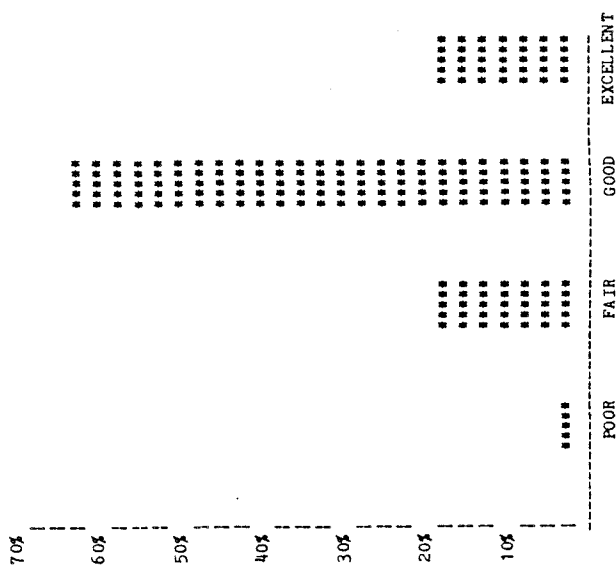


FIGURE 37  
HOW WOULD YOU RATE MONTANA'S  
HOTEL AND MOTEL ACCOMMODATIONS



FIGURE 40

HOW WOULD YOU RATE MONTANA AS A PLACE  
THAT'S EASY TO GET TO FROM YOUR HOME

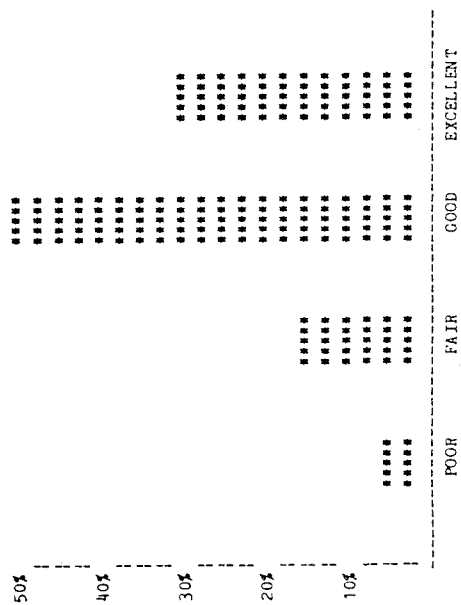


FIGURE 41

HOW WOULD YOU RATE MONTANA AS AN  
OVERALL PLACE TO TAKE A VACATION

## FAMILIARITY WITH MONTANA

Respondents were asked whether they had been in the Rocky Mountains or Montana recently, and whether they had ever been in Montana. When asked whether any of the vacations they had taken in the past three years included travel to or through the Rocky Mountains, 43.2% of the respondents replied that one or more vacations had. Also, they were asked whether any of those vacations included travel to or through the state of Montana. Less than one-fifth (18.6%) reported taking vacations in the past two years which included Montana. These respondents were further asked how many vacations they had taken in the past two years which included Montana; 63.0% said only one, 25.6% said two, and 12.0% said three or more. All respondents were asked whether they ever had been in Montana; a total of 57.7% reported that they had. Finally, respondents were asked how familiar they were with Montana. Figure 42 reveals that 53.7% said they were not at all familiar with Montana; 32.2% said they were somewhat familiar, and less than one respondent in seven (14%) reported being familiar with Montana.

To further understand the implications of increased familiarity with Montana, an analysis was undertaken to examine the differences between respondents reporting differing levels of familiarity with Montana as a vacation destination. The purpose of such an analysis was to understand how increases in familiarity, one of the key goals of promoting the state, are accompanied by changes in perceptions of the state as a good place to take a vacation.

There were very few demographic differences between respondents with different levels of familiarity. Of all the demographic variables examined, the results were statistically significant only for education and the region in which the respondent lived. Not unexpectedly, the closer to Montana someone lived, the more familiar he or she was with Montana. The relationship between education and familiarity was more complex; respondents with higher education

were more likely to report moderate familiarity with Montana.

Familiar respondents were not different from unfamiliar respondents on the outdoor recreation activities with the exception of hiking, climbing, and backpacking, where familiar respondents reported greater participation. In terms of vacation activities, familiar respondents reported more sightseeing, museum visiting, resort visiting, and visiting national and state parks. Familiarity was also correlated with longer vacations, both in terms of days away from home and distance, with reading travel books and articles, and with use of the airlines and automobiles for vacations.

However, the most striking difference between those who are familiar with Montana and those who are not is in their perceptions of the state. On the thirteen perceptual measures, respondents who were familiar with Montana were uniformly more positive than those who were somewhat familiar; these in turn were more positive than those who said they were not at all familiar with Montana. Nine of the thirteen differences were statistically significant, suggesting that the more the respondent knew about Montana, the better s/he liked the state.

The vacations planned by unfamiliar respondents tended to differ from those planned by familiar respondents as well. Familiar respondents reported increased probabilities of visiting Montana, Yellowstone and Glacier. They saw Montana as being closer (in driving time terms) and thought it more likely to be the primary destination of a vacation.

The overall conclusion that can be drawn from the analysis of familiarity is that as familiarity with Montana increases, and visiting the state for a vacation becomes more probable, perceptions of the state improve. To the extent that promotion has increased familiarity, promotion has created increased probabilities of visiting the state.



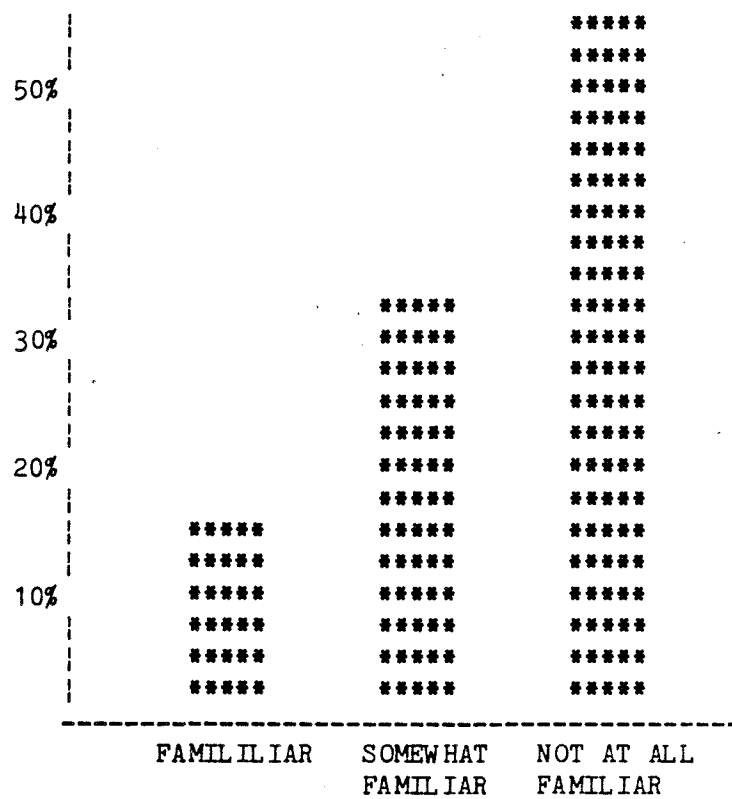


FIGURE 42

## FAMILIARITY WITH MONTANA AS A VACATION DESTINATION

### MONTANA VACATION POTENTIAL

Figures 43, 44 and 45 depict the chances of visiting Yellowstone National Park, Glacier National Park or the state of Montana in the next two years. In each case, more than a third of the sample said that there was a "high" or "very high" chance of a visit (Yellowstone 40.8%, Glacier 33.2%, Montana 44.2%). These estimates are probably substantially inflated because the respondents were aware that Montana was the sponsor of the survey by the time that they were asked these questions. Nevertheless, a substantial proportion of the sample manifested an inclination toward a vacation that included a Montana destination.

To target these potential visitors effectively for the promotional push that could convert them into actual tourists, it is useful to compare the demographic profiles of respondents who differed in their interest in visiting Montana. Analyses were run comparing the respondents who were and were not likely to visit across the various demographics: marital status, number and ages of children, age of respondent, urban or rural residence, educational level, occupational status, region and income. Four demographic characteristics exhibited statistically significant patterns related the reported probability of a Montana vacation.

Region of residence was the strongest of the four. As depicted in Figure 46, the closer the respondent lived to Montana, the greater the reported chances of visiting. The surrounding states and Canada reported the greatest probability of coming for a vacation. The far midwest and the southwest reported the lowest probabilities.

The second strongest relationship was between the chance of visiting Montana and the occupational status of the respondent. As demonstrated in Figure 47, the highest propensity to vacation in Montana was reported by those respondents with lower blue collar occupations (factory workers, construction

labors ect.). The higher level blue collar workers (die makers, shop foremen ect.) were also quite likely to say they might come (50% responding "high" or "very high"). These findings are in accord with the Davidson Peterson emphasis on blue collar workers.

A surprise was the extent of interest among the white collar segments of the sample. The second highest incidence of selecting "high" or "very high" was among moderate white collar workers (middle management, technical, ect.).

This finding suggests that targeting too narrowly on the blue collar segment may ignore a potentially profitable segment. Recall the previous analysis in which it was suggested that blue collar and white collar workers differed in their leisure and vacation activities. Seemingly, the blue collar workers are attracted to Montana for the fishing and hunting while the white collar segments are more interested in the resorts, skiing, sight seeing, and historical aspects of the state.

Income was the third significant demographic difference between respondents who varied in their reported chances of visiting the state. Figure 47 suggests that the key segment is fairly well off (household income between \$30,000 and \$50,000 yearly). Keeping in mind that many of these individuals fall in the blue collar category occupationally, one might conclude that Montana is considered as an attractive destination by the relatively more affluent segment of the populace (the blue collar respondents could easily fall in this income range if both spouses were employed).

The age of the respondent was the final variable which was useful in distinguishing between likely visitors and those who reported a low probability

of coming. The results of this analysis are contained in Figure 48. Respondents between the ages of 20 and 44 reported significantly greater likelihood of a Montana vacation than did their younger or older counterparts.

In summary, the demographic analysis of the respondents who reported increased potential for a Montana vacations suggests the that a typical target visitor would be from a nearby region, hold a low level blue collar or a moderate level white collar job, be reasonably affluent and be between 20 and 44 years old.

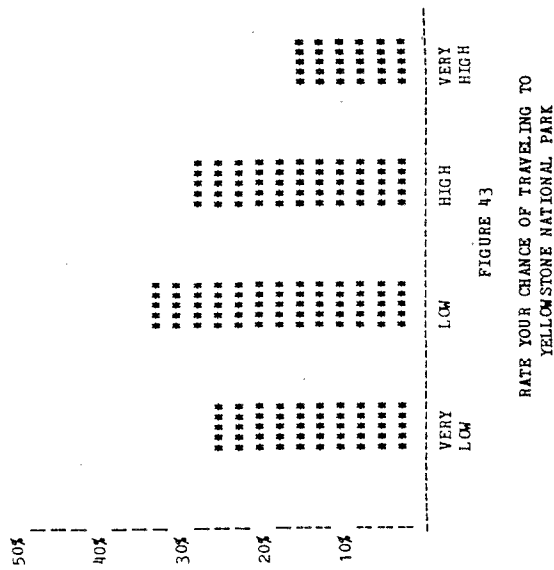


FIGURE 43

RATE YOUR CHANCE OF TRAVELING TO  
YELLOWSTONE NATIONAL PARK

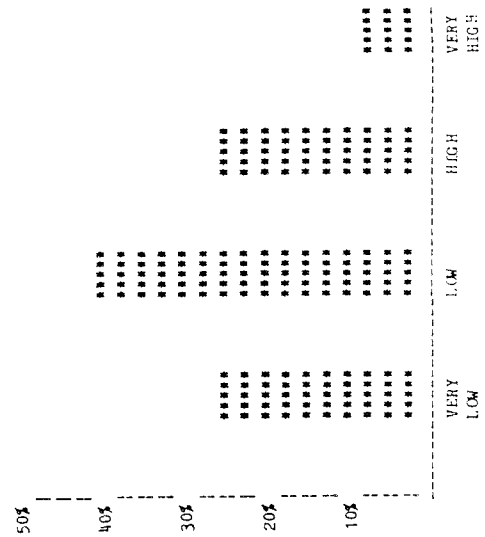


FIGURE 44

RATE YOUR CHANCE OF TRAVELING TO  
GLACIER NATIONAL PARK

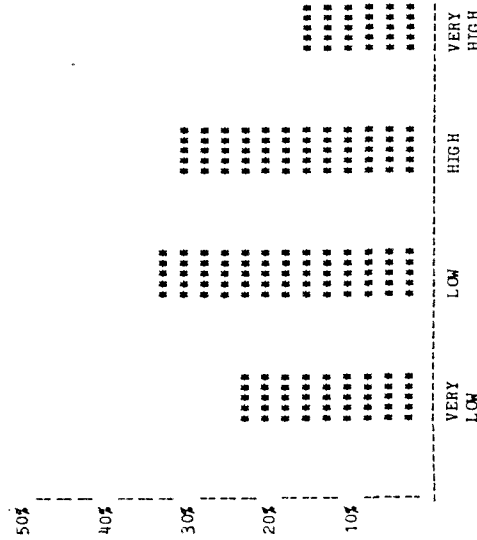


FIGURE 45

RATE YOUR CHANCE OF TRAVELING TO MONTANA

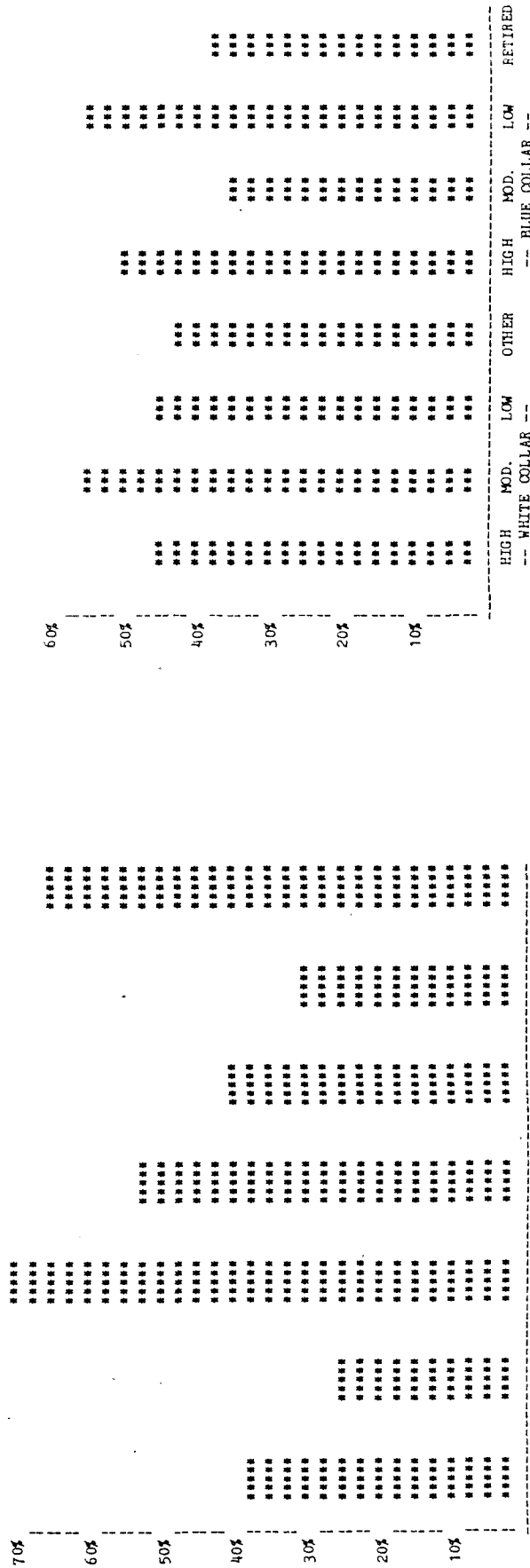


FIGURE 46  
PERCENT REPORTING HIGH OR VERY HIGH  
CHANCE OF TRAVELING IN MONTANA BY REGION

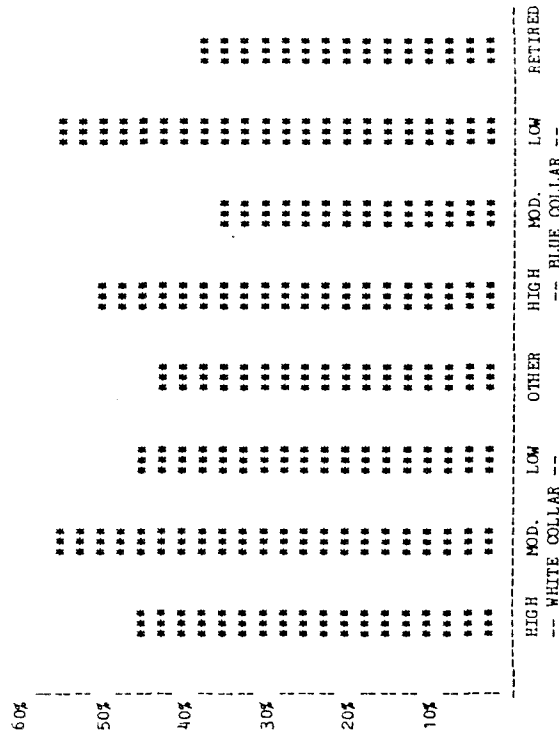


FIGURE 47  
PERCENT REPORTING HIGH OR VERY HIGH  
CHANCE OF TRAVELING IN MONTANA BY OCCUPATION

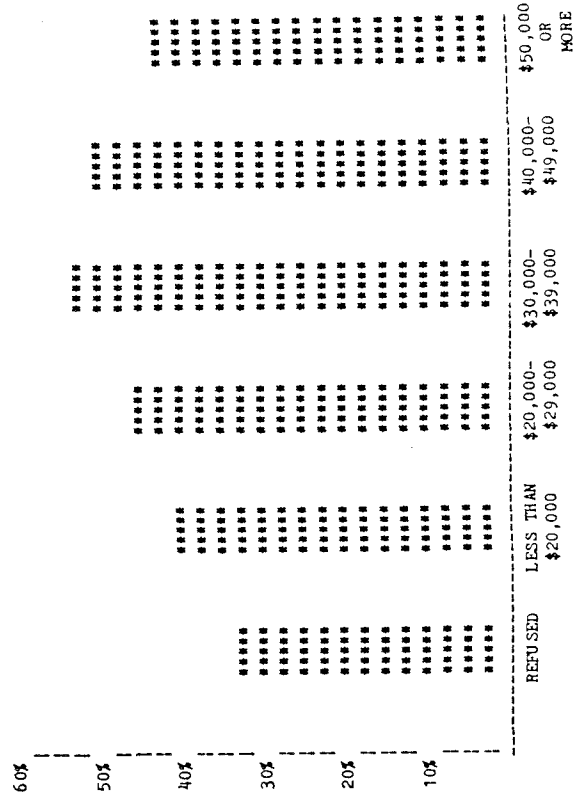


FIGURE 48

PERCENT REPORTING HIGH OR VERY HIGH  
CHANCE OF TRAVELING IN MONTANA BY AGE

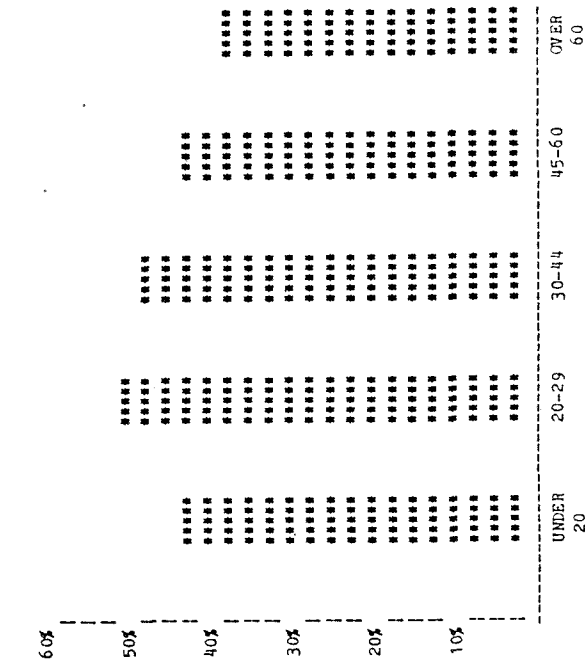


FIGURE 49

PERCENT REPORTING HIGH OR VERY HIGH  
CHANCE OF TRAVELING IN MONTANA BY INCOME

## IMPLICATIONS

A wide variety of inferences may be drawn from the findings of the study. Many pertain to individual tourism sectors, and others to the state as a whole. Some of the clearer and more general implications of the study are discussed below.

- 1- While a previous study (by Davidson-Peterson Associates) concluded that Montana's relative isolation from population centers was a major negative factor in attracting vacationers to the State, the present study did not find this to be the case. Most respondents reported that they did travel long distances on vacation. Further, respondents estimated that a vacation which included Montana would be of shorter duration than the most recent vacation they had taken.
  
- 2- There are low levels of familiarity with Montana among residents of the regions in the study - the "prime" tourism market. This observation also was made in the 1980 Davidson-Peterson study, and underscores the need to enhance the general awareness of Montana.



-3- The Davidson-Peterson report concluded that residents of the "prime" tourism market have no or very few perceptions of Montana. The current study determined that most people do, in fact, have perceptions of Montana, and that they are largely favorable perceptions. Further, these perceptions are reasonably uniform across regions in the study and across most of the "vertical" markets (e.g., skiers, hunters, campers, etc.). People who have been in Montana understandably have more perceptions about the state, but they also have more favorable perceptions. Also, Canadians in the sample perceived Montana's hotels and restaurants to be better than did respondents from other regions, and because of unfavorable currency exchange rates, did not feel Montana offers good value for the vacation dollar. As long as this state of affairs continues, the Canadian tourist may be less likely to vacation in Montana.

-4- The Davidson-Peterson study of vertical markets concluded that they were more similar than different. The current study reinforces that conclusion. Generally, there is considerable overlap in the major vertical markets. Therefore, media specialization can be overdone at least in terms of increasing awareness levels. This is not to say that vertical markets should not be targeted, but that Montana has "something for everyone" in terms of popular outdoor recreation and vacation activities.

-5- One major finding relates to respondent's estimation of the chance they will visit Montana, cross-referenced to occupational status. Both "moderate white collar", "upper blue collar", and "lower blue collar" workers estimated their chances of visiting Montana significantly higher than other occupation categories. The "moderate white collar" respondents come primarily to ski and visit resorts while the "blue collar" visitors come to Montana primarily to hunt and fish. The Davidson-Peterson study suggested blue-collar occupational categories as the major target of tourism promotions. The current study suggests there are opportunities for promoting Montana tourism to white-collar workers as well.

-6- The broadest implication from the entire study is that the major challenge for Montana - and the Tourism Promotion Unit - is not overcoming negative perceptions and attitudes about Montana; these are generally positive and favorable. Rather, the challenge is to increase awareness of and familiarity with Montana's bountiful vacation opportunities. The study suggests this can be done in part through advertising. It also can be accomplished through word-of-mouth (e.g., the Governor's appeal to Montanans to "write a friend", or the recommendations of satisfied visitors to the State), and by intensified efforts to make Montana more visible through feature articles and "special reports" in the national media.



MONTANA TOURISM  
MARKETING RESEARCH PROJECT

Final Report  
and Findings

Submitted to

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Montana Tourism Promotion Unit  
Department of Commerce  
State of Montana

by

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November, 1984

## TABLE OF CONTENTS

Chapter I - Introduction.....	2
Background and Central Mission of the Study.....	2
Overview of Research Design and Application of Findings.....	3
The Sample Plan and Sampling Procedure.....	4
Interviewers.....	10
Literature Review.....	11
Chapter II - Basic Findings.....	15
Introduction.....	15
Outdoor Recreation Activities.....	15
Vacation or Pleasure Trip Activities.....	17
Travel Modes and Behavior.....	19
Vacation Planning and Patterns.....	20
Familiarity with Montana.....	22
Perceptions of Montana.....	23
Ratings of Montana.....	25
Montana Vacation Potential.....	27
Chapter III - Regional Market Analysis.....	30
Introduction.....	30
Outdoor Recreation Activities.....	30
Vacation or Pleasure Trip Activities.....	35
Travel Mode and Behavior.....	38
Vacation Planning and Patterns.....	38
Perceptions of Montana.....	41
Montana Vacation Potential.....	43
Chapter IV - Campers As A Vertical Segment.....	46
Chapter V - Fishing As A Vertical Segment.....	58
Chapter VI - Skiers As A Vertical Market Segment.....	70
Chapter VII - Historians As A Vertical Segment.....	80
Chapter VIII - National and State Park Usage As A Vertical Segment.....	88
Chapter IX - Activities and Interests As Vertical and Market Segments.....	98
Chapter X - Special Analysis.....	116
Introduction.....	116
Familiarity with Montana.....	117
Outdoor Recreation and Vacation Activities.....	119
Ever Been to Montana Analysis.....	127
Free Associations with Montana.....	138
The Best and Worst Aspects of a Montana Vacation.....	139
Chapter XI - Montana Vacation Potential.....	144
Appendix.....	

### ACKNOWLEDGMENTS

The research team expresses their deep appreciation to those individuals who assisted in this study. The students who did such a great job of interviewing: Judy Bond, Amy Branning, William Brock, Carol Dahlen, Andrea Durnell, Delores Flanagan, Cheri Flanigan, Machelie DeSilva, Jeff Gleichman, Nancy Hensley, Pam Houseman, Brenda Landerdahl, Dan Nygarrrd, John Painter, Jerri Reis, Mitzy Ropp, Dan Sandall, and Shelly Talcott; Mr. Tim Antonsen and Dr. Richard Callen for their valuable computer assistance; the support of the Department of Management and the College of Business; the Montana Promotion Unit staff; and Mrs. Marlys Johnson for her invaluable assistance in the preparation of this document. Finally, thanks to our families for their patience and sacrifices during the Summer of 1984.

## CHAPTER I

### INTRODUCTION

#### Background and Central Mission of the Study

In December of 1983, the Department of Management of the College of Business at Montana State University was invited to submit a marketing research proposal to the Montana Promotion Division of the Department of Commerce. Four of the research team members met with Mr. John Wilson, Director of the Promotion Division twice during the months of December and January. A formal proposal was submitted to Mr. Wilson's office on January 31, 1984.

The central mission of the study was to conduct a major telephone survey to provide reliable tourism market information in the prime U.S. and Canadian markets for the State of Montana and private business. Specifically, the mission of the telephone survey was to:

- ...identify and refine key market segments by both geographical determination and by interests;
- ...profile activities, interests, and opinions of potential travelers;
- ...delineate perceptions of travelers, both positive and negative, concerning vacation attributes of the State of Montana;
- ...measure perceptions of travel patterns and time by vacation planners;
- ...collect specific demographic information about vacation planners including age, sex, income, occupation, marital status, number of children, and education.

Following several meetings with Mr. Wilson and his staff in the Spring of 1984, the research team submitted a revised research proposal on May 8, 1984. This proposal was accepted, and a formal contract was signed between the Department of Commerce and the Department of Management on June 10, 1984.

## Overview of Research Design and Application of Findings

### Research Design

The project team agreed from the outset that the appropriate research design would include administration of a long-distance telephone survey to a random sample of the population that comprises the "prime market" of Montana tourist visitors. This would enable an accurate measure of how Montana is perceived by a representative cross section of residents in primarily Midwestern and Western states plus nearby areas of Canada. For logistical cost and timing reasons, a telephone survey was preferred to mail or personal (face-to-face) interviews.

The survey instrument itself was constructed with considerable direction from the client. After pre-testing it was computerized to enable easy data recording and increased accuracy. Over approximately a six week span during the summer of 1984, 1224 long-distance telephone interviews were conducted from offices at Montana State University. Data were coded and verified and then analyzed to address the research questions central to the study.

### Application and Usefulness of the Findings

Ultimately, the findings are to assist the Promotion Division of the Montana Department of Commerce in the more effective and efficient promotion of Montana as a tourism destination. To some extent this goal can be served by sharing the research findings with Montana businesses; for example, survey questions about fishing will be useful to tackle shops, fishing guides, and other businesses located in prime fishing areas. To a much greater extent the findings will enable the Promotion Division to define vertical markets more precisely and understand regional markets (e.g., residents of Midwestern states) better for purposes of media advertising purchases and designing promotional themes.



### The Sample Plan and Sampling Procedure

In order to accomplish the study's objectives and still be cost efficient, a disproportionate stratified random sampling plan was designed. This procedure would accommodate the vertical (campers, skiers) market segmentation comparisons and allow firm statistics for characterization of horizontal (regional) markets.

Horizontal segments must be of adequate size to produce reliable estimations. Information regarding differences between regions was needed, and some discussion of differences within each region was called for. It was, therefore, critical that there be a sample of each region which was adequate in size and fully representative. Therefore, the prime market as defined by the Promotion Division for tourism was used as the stratification basis, and a random sample within each region was sampled and surveyed. Table I.1 shows six regions of the U.S. market selected so that there likely are similar interests and problems within each region, yet probably differences between the regions. Region 1, for example, contained Minnesota, Wisconsin, and the eastern portions of North and South Dakota. This region has an adequate population to justify consideration as a horizontal target. It probably has a similar interest profile. A 1980 survey showed considerable interest among this group and, most importantly for classification, it is served by I-94 as the major east/west route. Thus, it is homogeneous within, yet it is "different" than the Chicago and northeastern areas in Region 2, which has a more urban character, and a wide choice of major highways which bring other competing western destinations into their decision.

As in the case of significant vertical markets, these horizontal markets needed to be represented by a meaningful subsample base. The lower figure of 150 respondents was proposed for three regions because they are either of small size (#3, #4) or low "interest" level (#6). The remaining three U.S. regions would have 200 respondents.

The 1980 survey showed that the near Canadian market had several intriguing characteristics which make it an important segment. The importance of this segment warranted a large sample, but this was balanced by the relatively small population base of the region and the especially high costs of sampling in Canada. A sample of 200 was adequate for both contrasting with other segments and also within segment comparisons.

In summary, a "disproportionate stratified" random sampling was utilized. Seven geographic regions formed the basis for stratification. Each region was treated to a target number of either 150 or 200 randomly selected telephone interviews. Thus the total U.S. sample was 1050 (which yielded a sampling error of less than 3%) and the prime Canadian market sample was 200, for a total of 1250 respondents. This sampling plan allowed for reliable forecasts of overall market characteristics. It allowed for reliable comparisons among the vertical segments to be made by defining the groups using their responses. Further, it allowed significant target markets to be profiled and contrasted, and with some limitations, for comparisons to be made within the segments.

#### Sampling Procedure

For the U.S. sample, it was found to be both vastly more efficient and accurate to sub-contract the generation of telephone numbers. Consequently, a leading national firm, Survey Sampling, Inc., was utilized. The many advantages in doing so are summarized in Appendix A. In addition, formatted and replicated telephone call sheets and a computer tape of the sample telephone numbers were provided which greatly eased the calling procedure and control process. Finally, the SSI sample also gave the new MSA code and a state/county code for each number which enhanced both control and the research potential of the sample. The research team estimated that it would take approximately six telephone numbers to obtain one completed telephone questionnaire. Therefore,

6,300 telephone numbers were purchased from SSI. For each of the six regions, each sub-sample was systematically stratified to all the counties in proportion to each county's share of telephone households in that region.

For the near-Canadian market, a different procedure was utilized since SSI does not provide Canadian samples. The research team generated its own sample of telephone numbers. The four major metropolitan telephone books in the near-Canadian market (Calgary and Edmonton in Alberta; Saskatoon and Regina in Saskatchewan) were utilized. In each metropolitan area, 300 telephone numbers were randomly selected giving 1,200 telephone numbers in the Canadian sample. Sample replicates were also generated as was the case for the U.S. sample.

### Sample Performance

The total of telephone numbers proved sufficient to generate the required number of completed questionnaires, even though up to three call-backs were necessary in several of the of the regions. A total 1,263 questionnaires were completed, which resulted in 1,224 usable questionnaires included in the study. The regional breakdown is as follows:

TABLE I.1

		<u>Quota</u>	<u>Usable</u>
Region	I		
	Minnesota, Wisconsin, Eastern		
	North and South Dakota	200	190
	II		
	Michigan, Indiana, Illinois	200	200
	III		
	Wyoming, Idaho, Western North		
	and South Dakota	150	147
	IV		
	Colorado and Utah	150	146
	V		
	Oregon, Washington, Nevada,		
	Northern California	200	189
	VI		
	Southern California, Arizona		
	New Mexico, West Texas	150	152
	VII		
	Canada-Alberta, Saskatchewan	200	200

In the actual calling process, the sample of telephone numbers led to the following results:

Calls Attempted		10,373 <sup>A</sup>
Number Answered		4,648
Not Qualified <sup>B</sup>	1,446	31%
Refusals	1,040	22%
Terminations	132	3%
Callbacks	341	7%
Miscellaneous <sup>C</sup>	426	9%
Completions	<u>1,263</u>	<u>27%</u>
	4,648	100%

<sup>A</sup> This figure does not include pre-testing calls.

<sup>B</sup> Had not taken or was not considering taking an out of state vacation in the last two years or was not a vacation planner.

<sup>C</sup> These were either business or government offices or other non-household categories.

#### Sample Characteristics

The sample was designed to be representative of the various markets served by the Montana tourism industry and to provide a statistically efficient means of marking the various contrasts and descriptions derived. As the report will demonstrate, these purposes were admirably met. The use of qualification questions and regional stratification, however, serve to define the population base being represented as an abstract "market," not a simple random sample of the western United States. The travel restrictions used as qualifiers

undoubtedly lead to a relatively "upscale" sample bias. The stratification means that from a population viewpoint, the large population areas such as Southern California or the industrial areas of the Midwest were underrepresented. In most cases, of course, this had little, if any effect on the statistics used. Comparisons between regions were statistically free of the bias, and "campers" or other special interest groups probably shared more commonalty because of their interest than difference because of their region. Furthermore, the sample size distribution approximately counterbalanced the Montana travel propensity of the regions. Thus, in general the sample was highly representative of the market, even though not truly representative from a strict geographic or demographic point of view.

#### Questionnaire Design

The questionnaire was designed to facilitate both the description of the potential Montana travel market and to allow characterization and comparison of the various regional and interest segments. Travel motivations of matching interests and activities to Montana's offering were considered important, as was the perception of Montana as a place to travel. A concept list was developed and designed with the promotion group. The refined list was developed into a preliminary questionnaire, which was again examined and discussed with all concerned.

It was evident that the initial questionnaire was long, probably too long to hold the interest of many respondents. Several measures were taken to shorten the amount of response time. Each question was re-examined for relevance, and only the most needed were retained. Several "skips" were incorporated. The most significant "skip" was the asking of a rating of Montana for only those outdoor activities that the respondent reported doing sometimes or often.

Pretest revealed that a stronger introduction was needed to capture immediate interest, that the questionnaire was still too long, and that some

respondents were being irritated at having to rate Montana after having stated they had little or no familiarity with Montana. Examination of the pretest results, however, showed that while the frequency of "don't knows" was high, most respondents could rate Montana on several attributes even after stating that they were not at all familiar. The compromise was to give the interviewers room for judgment - they started the sequence of Montana ratings for all respondents, regardless of their previous "familiarity," and were allowed to skip out of this section if the respondent was becoming anxious or irritated.

The second major aspect of shortening the response time was to "computerize" the questionnaire. A BASIC program was written which posed each question and the codes for the response. It performed a range check on each response so that errors could be corrected immediately. Most importantly, from the standpoint of response time, it determined the skipping routine so that interviewers could maintain a steady pace with the rather complex set of skips used. The computer program allowed improved selection criteria for the activities to be rated for Montana, and a random sequencing of the activities to avoid order bias.

The final questionnaire is attached as an appendix to this report.

### Interviewers

The telephone interviewers were juniors, seniors, and graduate students at Montana State University. Some were specifically asked by members of the Project team to serve; others attended an orientation meeting announced in business classes at the end of Spring quarter classes. Interviewers then attended four orientation and practice meetings where proper interviewing techniques and procedures were taught by the project team. Particular attention

was focused on the need for meticulous record-keeping and on minimizing interviewer bias. Practice sessions included interviewers calling disguised confederates of the project team and administering the survey to them. They provided useful feedback for further "coaching" of the interviewers. After approximately two weeks of interviewing using the "hard copy" surveys interviewers were trained on the computerized version of the instrument. Throughout the data generation phase of the project, the interviewers were conscientious, eager to learn, and persistent under sometimes trying conditions (such as high refusal rates during telecasts of the 1984 Summer Olympics).

### Literature Review

A primary reason for conducting the research was the general lack of reliable, current data about the market. For the most part, research into the market for Montana tourism prior to 1979 was restricted to small-scale studies by individual businesses or industries; typically, such studies were too narrowly focused and/or methodologically suspect, and/or proprietary. However, three notable studies were conducted between 1979 and 1982, which addressed many of the concerns of the current research. Two of these formed a "base line" of market information, and among the missions of the current research was to update many of those findings. The three research studies are discussed in turn below.

1. The Old West Region Non-Resident Travel and Recreation Survey. In 1979 and 1980, a survey was conducted throughout the Old West Regional Commission states of Montana, North and South Dakota, Nebraska, and Wyoming by Oblinger-McCaleb, Architects, Engineers, and Planners of Denver, Colorado. In Montana 1000 personal interviews were conducted, and an additional 9,880 mail surveys were distributed among non-resident travelers in the state (of which about 36% were returned). The survey addressed motivations for travel, activities



participated in while in Montana, methods of travel, itineraries, expenditures for fuel, lodging, entertainment, etc., and respondent demographics.

Conspicuous by their absence in the report are summary findings and recommendations. However, several specific findings of the Old West Region study are discussed later in this report for purposes of comparison with the findings of the current study.

It is important to realize that the Old West Region study was of travelers who already were in the state of Montana, whereas the current study was of a random sample of household telephone subscribers in a wide geographic area. Thus, for example, perceptions of Montana and intentions to visit Montana differed from the findings of the current study simply because of the different populations under consideration.

2. The Montana Tourism Study of 1980. In December, 1980, Davidson-Peterson Associates, Inc., a New York based travel research company, delivered its report on Montana tourism to the Montana Travel Promotion Unit. Among specific goals of the research to: provide a picture of Montana's tourism markets; and profile Montana's image in its current markets; (these two objectives also were focal to the current research). The research involved over 700 (primarily telephone) interviews with "adults in Alberta and sixteen mid-western and western states who identified themselves as the primary trip planner and reported taking a past-year pleasure trip lasting at least one night away from home."

The study found very low awareness levels of Montana area vacation destinations. Montana was perceived as too cold, too far away, lacking in things to do, and as having nice, although not unique, natural attractions and scenery. Although the sample expressed considerable demand for the kinds of vacation activities that Montana has to offer, there was very low perception of Montana as a place to engage in those activities (e.g. downhill skiing). The study also listed a relatively high return rate among people who had visited

Montana and suggested that the major promotional task was, therefore, to attract first-time visitors to the state.

The study recommended that Montana tourism promotions be targeted at specific target market segments of people who actively engage in activities which Montana has to offer - such as skiing, fishing, and camping. It was further recommended that additional research be undertaken to understand better the market segments identified in the study.

3. The Montana Vertical Markets Study of 1982. In April, 1982, Davidson-Peterson Associates forwarded its report on Vertical Markets and Travel Trade to the Travel Promotions Unit. (Vertical markets are the specific market segments which had been identified by the 1980 study.) The data base consisted of 300 telephone interviews conducted in mid-west and western states and eight focused group discussions in various locations with people having particular vacation interests and experiences (e.g. owners of recreational vehicles or those who enjoy downhill or cross-country skiing).

The study sought to segment the Montana vacation market by determining interest in thirteen selected activities in Montana and five vacation-oriented concepts. The activities list was very similar to that used in the current research, and included visiting national parks, visiting resorts, fishing, canoeing, or rafting, hunting, snowmobiling, skiing, etc. The five vacation-oriented concepts included seeing unspoiled mountain scenery, "getting away by ourselves in the wilderness," visiting a family winter sports resort, and re-living the old west and being where cowboys are.

Interestingly, the report then determined that the people expressing interest in these activities and concepts were "generally more similar than different." Demographically, those interested in Montana activities tended to be somewhat younger and to exhibit a modest male bias and a modest blue collar

bias. With respect to the vacation concepts, the study recommended that Montana's future marketing efforts focus on five vacation concept targets:

- ...young, active, outdoor adventure seekers;
- ...families including children wanting a unified experience;
- ...families looking for winter sports opportunities;
- ...sightseers who are interested in western life and history, ranches, and rodeos; and
- ...recreational vehicle campers.

The study also made several specific recommendations for reaching these "concept groups" and for effectively communicating with the travel trade.

### Discussion

Some generalizations are possible from this entire background of research. There is evidence to suggest that Montana's promotional efforts be focused toward people expressing specific vacation interests. There also is some indication of the extent of interest in these activities among residents of Alberta and mid-western and western states; those comprise "base-line" data for comparison purposes over time in subsequent studies, such as the current study. On the other hand, all three previous studies were utterly devoid of any statistics beyond basic frequency counts. Thus, for example, they provided no idea of dominant vacation activities sought by people living in different geographic regions or of significant differences among household income strata and perceptions of Montana. The ability to segment markets more definitively and to reach them efficiently (via media communications) requires meaningful, although not necessarily complex, statistical comparisons which previous studies simply have not provided. Thus, in addition to up-dating base-line data captured in these earlier studies, the present research sought to go into levels of detail about specific activities and segments to enable a much more precise understanding of Montana tourism markets than previously had been possible.

## CHAPTER II

### BASIC FINDINGS

#### Introduction

The following discussion presents the findings in their most straightforward form, essentially "walking" through the questionnaire and examining the overall distribution of responses. More sophisticated analyses, which combine aspects of the data in the search for statistically meaningful differences, follow this Chapter. In most chapters of the report, the discussion will address findings in the same general groupings as follows:

1. Outdoor Recreation Activities
2. Vacation or Pleasure Trip Activities
3. Travel Modes and Behavior
4. Vacation Planning and Patterns
5. Familiarity with Montana
6. Perceptions of Montana
7. Montana Vacation Potential

#### Outdoor Recreation Activities

Respondents were asked about their participation in a number of outdoor recreation activities, all of which are available in Montana. They were asked whether they participated in the activity "never," "rarely," "sometimes," or "often." Table II.1 displays the response frequencies for these outdoor recreation activities.

TABLE II.1  
OUTDOOR RECREATION ACTIVITIES

<u>Activity</u>	<u>Participation Level</u>		
	<u>Never or Rarely</u>	<u>Sometimes</u>	<u>Often</u>
Spend time at beach	43.7%	22.9%	33.4%
Camping	46.9%	26.4%	26.7%
Skiing	67.2%	14.0%	18.4%
Snowmobiling	87.5%	6.0%	6.5%
Fishing	42.3%	24.2%	33.6%
Hunting	71.2%	13.0%	15.8%
Hiking, Climbing, or Backpacking	62.1%	21.8%	16.1%
Boating, Canoeing, or Rafting	49.3%	27.8%	22.9%

Respondents who indicated that they camped "sometimes" or "often" were also asked whether they used a tent, camper, or recreational vehicle when they camped. Tent camping was most popular; 61.8% of the campers reported using a tent; 38.9% reported using a camper; and 24.6% said they used a recreational vehicle. (Note: this adds to more than 100% because some campers used more than one of those means.)

Similarly, those who reported skiing "sometimes" or "often" were asked what kind of skiing they did; 78.1% reported downhill (alpine) skiing, and 37.1% reported cross-country (nordic) skiing.

Those who fished "sometimes" or "often" were asked which kind of waters they fished; 88.2% reported fishing in lakes, 67.2% in streams or rivers, and 27.% in the ocean.

Hunters were asked further questions about bird hunting, deer hunting, and hunting for "other big game." Three hunters in five (59.7%) reported bird hunting, 80.5% reported deer hunting, and 42.5% reported hunting other big game.

Those who reported boating, canoeing, or rafting "sometimes" or "often" were asked about these three activities separately. Over four in five, (81.2%) reported boating, 32.7% said that they canoed, and 26.5% said they went rafting.

Most noteworthy concerning outdoor recreation activities are the relative popularity of fishing and spending time at the beach, and the relative unpopularity of snowmobiling (74% of the entire sample reported never snowmobiling).

#### Vacation or Pleasure Trip Activities

A number of other vacation-related activities also were investigated. Table II.2 reports the relative popularity of visiting museums, resorts, historic places, and national or state parks, plus golfing, seeing big cities, seeking fine restaurants, going to nightclubs, and traveling just to sightsee. They are rank-ordered with the most popular activity appearing first.

TABLE II.2  
VACATION OR PLEASURE TRIP ACTIVITIES

<u>Activity</u>	<u>Participation Level</u>		
	<u>Never or Rarely</u>	<u>Sometimes</u>	<u>Often</u>
Travel to Sightsee	15.9%	27.8%	56.3%
Visit National or State Parks	22.3%	37.3%	40.3%
Visit Historic Places	24.7%	41.1%	34.1%
Seek Fine Restaurants	34.5%	31.6%	33.8%
Visit Museums	37.2%	33.9%	29.0%
See Big Cities	48.4%	30.6%	21.0%
Visit a Resort	47.1%	34.1%	18.8%
Play Golf	71.8%	13.1%	15.1%
Visit Night Clubs	61.9%	27.5%	14.4%

Note that 84.1% of all respondents reported that they "sometimes" (27.8%) or "often" (56.8%) traveled "just to sightsee." In addition, 77.6% reported that they sometimes or often visit national or state parks. Montana, with its abundance of state and particularly national parks, and spectacular scenery for sightseeing, is well-suited to capitalize on those most popular vacation activities.

Also noteworthy are the relative popularity of visiting historic places (75.2% sometimes or often) and museums (62.9% sometimes or often). Again, Montana is relatively well-endowed with these, particularly historic places such as the Custer Battlefield. Further, the museums and historic places are spread throughout the state, providing Eastern Montana with good inducements to tourists.

Although they rank low in overall popularity, still Seeing Big Cities and Visiting a Resort are vacation activities which more than half the respondents reported doing sometimes or often (51.6% and 52.9% respectively).

Respondents who reported that they "sometimes" or "often" visited resorts while on vacation were asked what resort activities they engaged in. Many different activities were reported, ranging from visiting amusement parks to playing shuffleboard. The twelve most frequently mentioned activities are listed in Table II.3.

TABLE II.3  
MAJOR RESORT ACTIVITIES

<u>Activity</u>	<u>Frequency</u>	<u>Percent of Activities</u>
Swim	163	25.8
Relax	73	11.6
Ski	49	7.8
Fish	47	7.5
Golf	45	7.1
Boat	28	4.4
Tennis	26	4.1
Sightsee	23	3.6
Camp	16	2.5
Beaches	16	2.5
Suntan	15	2.4
Dining and Dancing	15	2.4
Other	<u>115</u>	<u>100.0%</u>

Finally, note the overall unpopularity of playing golf and visiting night clubs as vacation or pleasure trip activities. In fact, almost three

respondents in five (59.6%) reported never playing golf on vacation.

#### Travel Modes and Behavior

The study also explored how far people traveled on vacations, their mode of travel, and how they made travel plans. Table II.4 reports the popularity of the various possible travel modes, and Table II.5 depicts other aspects of travel behavior.

TABLE II.4  
POPULARITY OF VACATION TRAVEL MODES

<u>Travel Mode</u>	<u>Relative Use of Mode</u>		
	<u>Never or Rarely</u>	<u>Sometimes</u>	<u>Often</u>
By Car	5.9%	16.0%	78.1%
By Air	50.9%	30.0%	29.1%
By Motorcycle	91.5%	5.6%	2.9%
By Bus	90.0%	7.85	2.3%
By Train	92.7%	6.7%	0.7%

TABLE II.5  
INCIDENCES OF OTHER TRAVEL BEHAVIOR

<u>Behavior</u>	<u>Relative Incidence</u>		
	<u>Never or Rarely</u>	<u>Sometimes</u>	<u>Often</u>
Travel Long Distances	16.5%	41.9%	41.6%
Use Travel Agents	53.7%	26.6%	19.8%
Travel in Group Tours	84.6%	10.9%	4.6%
Read Books or Articles about Vacation Places	21.1%	35.7%	43.2%
Seek Friends' Advice about Vacation Places	18.3%	32.2%	49.6%

In Table II.4 note the overwhelming preference for travel by car (including vans, pickup trucks, and recreational vehicles); almost four respondents in five (78.1%) reported "often" traveling by car on vacations. Also noteworthy is the



strong ranking of air travel; almost three respondents in five (59.1%) reported "sometimes" or "often" traveling by air on vacations.

Table II.5 reports a variety of vacation and vacation planning behavior. Note first that over four respondents in five (82.5%) report traveling long distances "sometimes" or "often" while on vacation. This should be encouraging given Montana's relative distance from major population centers. Also note the popularity of reading books or articles about possible vacation destinations. This underscores the importance of magazine articles about Montana, and of efforts to encourage magazines to write and publish such articles. Also very popular is the solicitation of friends' advice about places to go on vacation (77.9% "sometimes" or "often"), and the implicit importance of word-of-mouth promotion of Montana by both residents and recent visitors. Note that slightly less than half the sample (46.3%) "sometimes" or "often" uses the services of travel agents, although less than one in five (19.8%) reported "often" using them. Finally, note the relative unpopularity of traveling in group tours; 68.1% reported never traveling in group tours.

Those who reported using the services of travel agents "sometimes" or "often" were asked whether they used the agents to help decide where to go and/or how to get there. While only 6.3% of those who use travel agents do so to determine where to go, nearly two thirds (65.2%) use them to determine how to get to their destinations; 28.4% use them for both purposes.

#### Vacation Planning and Patterns

In addition to asking about the use of travel agents, the study also asked respondents whether they wrote or called state agencies for assistance in vacation planning. About two thirds (63%) reported that they did not, while one-third (37%)% said that they did. The information from state agencies was

used more to determine what to do in a state (80.6% of those contacting state agencies) than for determining which states to visit (44.8%).

Respondents were asked how far in advance they planned vacations.

Table II.6 depicts vacation planning lead times. While it doubtless is true that longer, more distant vacations (such as assumed to be true about a Montana vacation) require relatively longer lead times, still, one third of the respondents reported planning the vacation one month or less in advance of actually traveling. By contrast, only 10.7% of all respondents reported planning them more than six months in advance.

TABLE II.6  
LEAD-TIME FOR VACATION PLANNING

<u>Months in Advance of Vacation</u>	<u>Percent</u>
1 Month or Less	33.2%
2 Months	25.5%
3-5 Months	13.2%
6 Months	17.4%
7-11 Months	9.0%
1 Year or Longer	1.7%

The study also asked respondents to report how many out of state vacations they had taken in the past three years. Responses ranged from none (5.0%) to the case of an airline steward who reported 120, and averaged 4.0 or slightly more than one per year. Predictably, the average number of summer vacations, 2.6, exceeded the average number taken in the winter, 1.4. Out of state vacations ranged from one day in length to six months, and averaged 14.8 days. Table II.7 depicts length of time respondents were away from home on their last out of state vacation. Note that over one third of vacations (34.4%) were one week or less, approximately two in five (41.0%) lasted between eight days and two weeks and approximately one fourth (24.7%) lasted more than two weeks.

TABLE II.7  
LENGTH OF TIME AWAY FROM HOME ON MOST  
RECENT OUT-OF-STATE VACATIONS

<u>Length of Time Away</u>	<u>Percent</u>
6 Days or Less	20.0%
One Week	14.4%
8-9 Days	5.9%
10 Days	12.4%
11-13 Days	3.9%
Two Weeks	18.8%
15 Days to 3 Weeks	14.3%
22 Days to 1 Month	5.9%
1 Month to 3 Months	3.2%
More than 3 Months	1.1%

Elsewhere in the interview, respondents were asked how long a vacation would last which included Montana. By comparison, 48% estimated that a vacation including Montana would last one week or less, 45.2% said such a vacation would last between eight days and two weeks, and only 6.8% said it would last more than two weeks. The average was 10.0 days. Thus it can be said that, in general, vacations which include Montana are estimated to be shorter than the average length of respondents' most recent vacation. However, respondents' estimates may not have included driving time to Montana.

#### Familiarity with Montana

Questions were asked about respondents' familiarity with Montana and the Rocky Mountain region, primarily in order to determine how, if at all, this familiarity affects perceptions about Montana. However, it also is useful to examine the basic frequencies.

First, respondents were asked whether any of the vacations they had taken in the past three years included travel to or through the Rocky Mountains; 43.2% replied that one or more vacations had. Also, they were asked whether any of those vacations included travel to or through the state of Montana. Less than

one-fifth (18.6%) reported taking vacations in the past two years which included Montana. These respondents were further asked how many vacations they had taken (in the past two years) which included Montana; 63.0% said only one, 25.6% said two, and 12.0% said three or more. All respondents were asked whether they ever had been in Montana; a total of 57.7% reported that they had, and 17.3% reported having been in Montana recently. Finally, respondents were asked how familiar they were with Montana; 53.7% replied they were not at all familiar with Montana; 32.2% said they were somewhat familiar, and less than one respondent in seven (14%) reported being familiar with Montana.

#### Perceptions of Montana

All respondents were asked to rate Montana on a number of vacation-related features (e.g., rate Montana as a scenic place to visit) and to respond with "poor," "fair," "good," "excellent," or "don't know." During part of the data generation period, respondents expressing no familiarity with Montana were not asked to rate it on these features. Further, when a respondent appeared bored or frustrated by not having an opinion on Montana for several features in a row, interviewers were instructed to skip to the next section of the questionnaire. Thus, not all respondents rated Montana on these features; those who did not may be assumed to be less familiar with Montana than those who did respond. Of all respondents, 25% "balked" within the first four questions about vacation-related features, and the interviewers skipped to the next section of the questionnaire. A total of 31% balked within the first eight questions.

Table II.8 reports the percentages of respondents who had an opinion about Montana on the vacation-related features, and the percentage responding that they did not know. Note the large proportion of respondents who had an opinion about Montana as "easy to get to" (93.6%), as a "place for rest and relaxation" (90.5%), about Montana's climate (88.7%), about Montana as a place to enjoy

outdoor activities (88.4%), and as a place to take a family vacation (87.7%). On the other hand, note also the level of ignorance about a number of vacation-related features in Montana. For example, over half of those responding had no opinion (i.e., did not know) about Montana's hotels and motels (55.7% "don't know"), and restaurants (51.6% "don't know"), or Montana as a place offering good value for vacation dollars (50.1% "don't know"). Moderate levels of respondent ignorance were found for Montana as a place with interesting historical sites (34.7% "don't know"), as offering a variety of vacation activities (26.6% "don't know"), as a place with friendly people (25.8% "don't know"), and as a scenic place to visit (22.3% "don't know").

Table II.9 summarizes the ratings themselves by reporting the percentages of those having an opinion about vacation-related activities who rated Montana "poor," "fair," "good," and "excellent."

TABLE II.8  
PERCENTAGES OF RESPONDENTS PROVIDING AN OPINION  
ABOUT MONTANA ACTIVITIES

RATINGS OF MONTANA AS A PLACE	% OF THOSE RESPONDING	
	WHO GAVE A RATING (POOR, FAIR, GOOD, EXC)	% OF THOSE RESPONDING WHO ANSWERED "DON'T KNOW"
SCENIC PLACE TO VISIT	77.7	22.3
GOOD DOLLAR VALUE	44.9	50.1
FRIENDLY PEOPLE	74.2	25.8
HISTORICAL SITES	65.3	34.7
ENJOY OUTDOOR RECREATION	88.4	11.6
VARIETY OF VACATION ACTIVITIES	73.4	26.6
GOOD RESTAURANTS	48.4	51.6
FAMILY VACATION	87.7	12.3
HOTELS AND MOTELS	44.3	55.7
CLIMATE	88.7	11.3
REST/RELAXATION	90.5	9.5
EASY TO GET TO	93.6	6.4
OVERALL VACATION PLACE	79.0	21.0

TABLE II.9  
PERCEPTIONS OF MONTANA

RATINGS OF MONTANA AS A PLACE:	POOR	FAIR	GOOD	EXCELLENT
SCENIC PLACE TO VISIT	1.4	10.2	38.0	50.3
GOOD DOLLAR VALUE	5.8	19.6	49.9	24.8
FRIENDLY PEOPLE	0.5	7.6	39.8	39.8
HISTORICAL SITES	2.6	20.8	48.4	28.1
ENJOY OUTDOOR REC.	0.3	4.2	35.7	59.7
VARIETY OF VAC ACTIVITIES	3.3	18.3	46.6	31.7
GOOD RESTAURANTS	7.0	27.8	49.5	15.6
FAMILY VACATION	1.3	8.0	49.9	40.7
HOTEL AND MOTELS	2.8	18.0	62.1	17.0
CLIMATE	4.5	28.6	52.5	14.4
REST RELAX	1.3	6.7	51.8	40.2
EASY TO GET TO	18.6	24.0	41.2	16.3
OVERALL VACATION PLACE	4.2	15.9	50.1	29.7

There appears to be a quite favorable impression of Montana on several features listed in Table II.9. Over 90% of those who rated felt Montana to be either "good" or "excellent" as a place to enjoy outdoor activities (95.4%), as a place for family vacations (90.6%), as a place to rest and relax (92%), and as a place with friendly people (91.7%). Even the feature that produced the least favorable ratings of Montana, climate (as expected), was still considered "good" or "excellent" by two-thirds (66.9%) of the 776 respondents who provided a rating. Consistent with the findings of an earlier study by Davidson-Peterson Associates are the relatively low ratings for Montana's hotels, motels, and restaurants. Finally, note that of those who rated, 80.1% rated Montana as "good" or "excellent" as an overall place to take a vacation.

#### Ratings of Montana

At the beginning of the telephone interviews, respondents were asked to name the three main vacation activities that they or their families enjoy. When those activities were among those listed in Tables II.1 and II.2 they also

reappeared during the questions asking the respondent to rate Montana. Thus, for example, those who reported "going to the beach" on vacations were asked to rate Montana as a place to go to the beach. Table II.10 displays the ratings of Montana as a place to enjoy particular vacation or outdoor recreation activities, reported only by those respondents who volunteered in the free response section that they did these activities while on vacations. Also in Table II.10 are the numbers of respondents who reported doing these activities while on vacation. For purposes of comparison, activities in Table II.10 appear in their order from Tables II.1 and II.2.

Note, that in general, Montana rates very well on the most popular vacation activities. For example, 446 respondents - the largest number for any activity - reported sightseeing while on vacations in the "top of mind" questions at the beginning of the questionnaire; of these 84.9% considered Montana to be "good" or "excellent" for sightseeing. Similarly, camping, which ranked second with 253 respondents, was rated as "good" or "excellent" in Montana by 95.3% of them. The number of respondents who reported fishing (195 respondents, 91.3% of whom rated Montana as "good" or "excellent"), and those who reported hiking, climbing, or backpacking (141 respondents, 95.7% of whom rated Montana as "good" or "excellent") suggest that Montana is perceived very favorably with respect to the vacation activities which respondents most frequently reported doing. Montana also received "good" or "excellent" ratings from 89.4% of the skiers, 95.2% of the hunters, and 92.8% of those who visit state or national parks. Conversely, Montana received comparatively low ratings from those who spend time at the beach (25.9% "good" or "excellent"), those who seek fine restaurants (only 9.2% rated Montana "excellent" for restaurants), those who visit night clubs (47.4% "good" or "excellent"), and of course, those who like to see big cities (14.8% "good" or "excellent"). With the exception of going

to the beach, these other activities are among the least popular vacation activities.

TABLE II.10  
RATINGS OF MONTANA AS A PLACE  
TO ENJOY PARTICULAR ACTIVITIES

<u>Activity</u>	Number of Respondents Who do the Activity <u>on Vacation*</u>	<u>Rating of Montana</u>	
		<u>Good</u>	<u>Excellent</u>
Spend Time at Beach	131	20.6%	5.3%
Camping	253	36.4%	58.9%
Skiing	95	38.9%	50.5%
Snowmobiling	22	31.8%	45.5%
Fishing	195	40.5%	50.8%
Hunting	62	24.2%	71.0%
Hiking, Climbing, or Backpacking	141	26.2%	69.5%
Boating, Canoeing or Rafting	117	43.6%	36.8%
Travel to Sightsee	446	46.6%	38.3%
Visit National or State Parks	126	57.1%	35.7%
Visit Historic Places	86	55.8%	23.3%
Seek Fine Restaurants	65	46.2%	9.2%
Visit Museums	80	40.0%	17.5%
See Big Cities	61	8.2%	6.6%
Visit a Resort	61	54.1%	19.7%
Play Golf	40	52.5%	15.0%
Visit Night Clubs	19	26.3%	21.1%

\*In order to be asked to rate Montana on an activity, a respondent must first have named the activity when describing vacation activities that the respondent's household enjoyed. Obviously, participation levels in these activities is higher.

#### Montana Vacation Potential

Respondents were asked about the possibilities of taking a vacation which included Montana. Estimates of the number of days it would take to drive to Montana ranged from one (31.5% of respondents) to eleven(!), and averaged 2.2 days. As discussed earlier, the average estimated total length of a vacation



including Montana (10.0 days) was less than the average length of respondents' most recent vacation (14.8 days). Respondents were then asked whether the journey getting to Montana would be enjoyable; 83.4% replied that it would. They also were asked whether such a vacation trip would have a Montana "primary destination." While over half the respondents (53.6%) replied that their primary destination would be Montana (or somewhere in Montana), a large proportion (46.4%) said they would travel in Montana on their way to and/or from somewhere else. When asked about the directness of such a trip to Montana 23.4% said they would travel directly to Montana, while 73.5% reported they would stop and sightsee along the way; 3.0% did not know.

Finally, in this section respondents were asked about the realistic possibility of visits in the next two years to Glacier National Park, Yellowstone National Park, and the state of Montana. Table II.11 summarizes these responses. Note that more than two respondents in five estimated as "high" or "very high" the chances that they will visit Yellowstone Park (40.8%) or Montana (44.2%) in the next two years.

TABLE II.11  
RESPONDENTS' ESTIMATES OF THE CHANCE THEY  
WILL VISIT YELLOWSTONE PARK, GLACIER PARK, OR  
THE STATE OF MONTANA IN THE NEXT TWO YEARS

<u>Destination</u>	Very <u>Low</u>	<u>Low</u>	<u>High</u>	Very <u>High</u>	Don't <u>Know</u>
Yellowstone Park	24.9%	33.5%	26.1%	14.7%	0.8%
Glacier Park	26.5%	39.4%	23.7%	8.5%	2.0%
Montana	21.5%	32.7%	28.8%	15.4%	1.6%

Note:

These numbers should be interpreted cautiously. By the time respondents rated their chances of visiting Montana, they were aware that the interview was focusing on Montana, and they may have wanted to create a favorable impression, answer what they thought the interviewer wanted to hear. Thus these percentages may be inflated beyond a more objectively determined estimate.

CHAPTER III  
REGIONAL MARKET ANALYSIS

Introduction

In this section, the regional differences, or lack thereof, are highlighted and discussed. The questionnaire variables are organized into six groupings which are also utilized in the chapter on vertical markets. The six groupings are:

1. Outdoor Recreation Activities
2. Vacation or Pleasure Trip Activities
3. Travel Mode and Behavior
4. Vacation Planning and Patterns
5. Perceptions of Montana
6. Montana Vacation Potential

Outdoor Recreation Activities

The response averages for each activity by region are presented in Table III.1. Each of the eight activities are statistically different across regions.

Spend Time at the Beach

The frequency with which people engage in this activity appears to be closely related to the accessibility of water. At least in the nearby Canadian Provinces of Alberta and Saskatchewan, spending time at the beach had a higher frequency than any other regions. Following Canada are the Northwest, Southwest, and the two Midwestern regions. The lowest average response was in Colorado and Utah followed by Wyoming, Idaho, and Western North Dakota and South Dakota. All areas with less beach and water areas. The significance of this

TABLE III.1  
OUTDOOR RECREATION ACTIVITIES  
AVERAGE RATING BY REGION

	REGION										
	MINN WIS	WYO	IDAHO	WASH ORE	CANADA						
	EASTERN	WESTERN		NEV	SO CAL	(ALBERTA)					
RATING OF MONTANA	N.D. AND	N.D. AND	COLO	NORTHERN	AZ NM	SASKAT-					TOTAL
AS A PLACE TO:	S.D.	ILL	UTAH	CAL	WEST TEX	(CHEVAN)					SAMPLE
SPEND TIME AT BEACH	2.83	2.78	2.38	2.04	2.84	2.90	3.03	***			2.71
GO CAMPING	2.23	2.35	2.84	2.80	2.65	2.50	2.54	***			2.54
GO SKIING	1.90	1.69	1.95	2.34	1.93	1.92	2.28	***			2.00
SNOWMOBILING	1.69	1.55	1.53	1.37	1.20	1.20	1.56	***			1.45
GO FISHING	2.63	2.66	3.01	2.73	2.67	2.43	2.40	***			2.64
GO HUNTING	1.88	1.75	2.58	2.01	1.67	1.51	1.55	***			1.83
HIKE, CLIMB OR PACK	2.08	1.81	2.08	2.30	2.25	2.18	2.16	***			2.12
GO BOATING, CANOE OR											
RAFT	2.66	2.54	2.44	2.28	2.40	2.14	2.45	***			2.43

Rating Scale: never = 1 rarely = 2 sometimes = 3 often = 4

STATISTICAL SIGNIFICANCE:

\*\*\*p < .001

\*\* p < .01

\* p < .05

activity in nearby Canada is shown by the fact that over 70% of those questioned sometimes or often spend time at the beach.

### Camping

This activity is certainly one of the most popular in the sample yet displaying significant differences across regions. The lowest average response was in the two Midwest regions and higher throughout the five Western regions with the nearby Rocky Mountain regions of Colorado, Utah, Wyoming, Idaho, and Western North Dakota and South Dakota having a higher average response.

In terms of the three sub-categories of how people camped, there appear to be no statistically significant differences by region. Frequency of camping by tent, camper, or recreation vehicle is quite similar across the regions.

### Skiing

The highest average responses are in Colorado and Utah, followed by Canada. The lowest is in the far midwestern region of Michigan, Illinois, and Indiana. The remaining four regions are almost identical in average response. Approximately forty-five percent of those sampled in Colorado/Utah and Canada do sometimes or often engage in skiing.

For the sub-categories of downhill and cross-country skiing, some regional differences were noted. Of those who ski, a higher number engage in downhill skiing in four Western regions, excepting the Northwest which is somewhat lower. The lowest average response for downhill skiing is found in the two Midwest regions. It is important to note that the differences are not statistically strong ( $p \leq .052$ ).

Perhaps the most interesting finding is that the Southwest region engaged in downhill skiing as frequently as Canada or the other Western regions and considerably more than the Midwest regions.

Of those who ski, a higher number engage in cross-country skiing in Minnesota, Wisconsin, and Eastern North and South Dakota. Canada is very close to this region. The lowest average responses are the Northwest and Southwest.

#### Snowmobiling

This outdoor activity had the lowest response average of any of the activities. Only 12% of the total sample reported going snowmobiling on a sometimes or often basis. The response rates were quite similar in the colder regions and lower in the Northwest and Southwest. A word of caution here, as the sample cell sizes for some regions are too small to make confident regional contrasts.

#### Fishing

Fishing is certainly one of the more popular outdoor recreation activities in all the regions. Fishing appears more popular in the Rocky Mountain states and least frequent in Canada. However, the fact that the Canadian sample was largely metropolitan may be understating the Canadian response on fishing. Interestingly, the Southwest had an average response for fishing almost identical to Canada.

For the sub-categories, stream fishing was more popular in the Rockies and Northwest while lake fishing is popular in most regions except the Southwest. Ocean fishing is most popular in the Northwest and Southwest.

#### Hunting

This activity does display some sharp regional differences. The highest average response occurred in Wyoming, Idaho, Western North Dakota and South Dakota, and the lowest in Canada and the Southwest. The other regions are somewhere in between these two regions.

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#### Hunting

This activity does display some sharp regional differences. The highest average response occurred in Wyoming, Idaho, Western North Dakota and South Dakota, and the lowest in Canada and the Southwest. The other regions are somewhere in between these two regions.

The sub-categories of bird hunting and deer hunting showed no significant regional differences. However, other big-game hunting did, with all four Western regions and Canada showing a much higher percentage than the two Midwest regions. This is probably explained by the fact that there are few other big-game hunting opportunities in the Midwest other than deer.

#### Hiking, Climbing, Backpacking

This activity was slightly more popular in Colorado/Utah and the Northwest than elsewhere. The region of Michigan, Illinois, Indiana, had the lowest response average. None of the three sub-categories of hiking, climbing, backpacking, or seeking wilderness showed any significant regional differences.

#### Boating, Canoeing, or Rafting

One of the more popular outdoor activities in all regions, with the Southwest having the lowest average response, and the two Midwest regions having the highest average response. For the sub-categories, boating showed no significant difference across regions, yet canoeing and rafting did. The highest canoeing regions were the two Midwest regions, while the highest average for rafting occurred in Colorado/Utah and the Northwest.

#### Vacation or Pleasure Trip Activities

This section discusses the frequency of vacation or pleasure trip activities and comparing these across various geographical regions. We asked how frequently did the individual and his/her family engage in various activities. We asked them about a total of nine activities which are listed in Table III.2.



VACATION OR PLEASURE TRIP ACTIVITIES  
AVERAGE RESPONSE BY REGION

ACTIVITY	REGION																TOTAL SAMPLE
	MINN WIS EASTERN		WYO IDAHO WESTERN		WASH ORE NEV		CANADA (ALBERTA)										
	N.D. AND S.D.		MICH ILL		IND		S.D.		UTAH		COLO		NORTHERN CAL		SO CAL AZ NM WEST TEX (CHAMAN)		
VISIT MUSEUMS	2.70	2.74	2.75	2.81	2.71	2.88	2.88	2.88	2.78								
PLAY GOLF	1.89	1.98	1.74	1.77	1.66	1.67	2.12	1.85									
TRAVEL TO SIGHTSEE	3.36	3.40	3.34	3.38	3.20	3.32	3.35	3.34									
VISIT A RESORT	2.50	2.41	2.20	2.58	2.28	2.58	2.69	2.47									
NAT. OR STATE PARKS	2.90	2.99	3.18	3.30	3.13	3.10	3.25	3.11									
SEE BIG CITIES	2.57	2.52	2.27	2.44	2.28	2.54	2.73	2.49									
VISIT HISTORIC PLACES	2.92	3.05	3.21	3.05	2.93	3.10	2.91	3.02									
FINE RESTAURANTS	2.79	2.95	2.66	2.85	2.72	3.03	2.84	2.84									
NIGHT CLUBS	2.23	2.34	2.01	2.03	1.94	2.35	2.27	2.18									

Rating Scale: never = 1 rarely = 2 sometimes = 3 often = 4

STATISTICAL SIGNIFICANCE:

\*\*\*p < .001

\*\* p < .01

\* p < .05

The relative popularity of these activities are ranked as follows:

1. Travel Just to "Sightsee"
2. Visit National or State Parks
3. Visit Historical Places
4. Dine at Fine Restaurants
5. Visit Museums
6. Travel to see Big Cities
7. Visit Resorts
8. Go to Night Clubs
9. Play Golf

The most popular vacation activity, travel to sightsee, showed no significant differences across the geographical regions. Neither did visiting museums.

The second most popular activity, visiting national or state parks, was more popular in the Western regions and Canada which have more national parks and by themselves are major tourist attractions.

Approximately 74% of the sample reported that they sometimes or often visited historic places. However, there were only slight regional differences.

Dining at fine restaurants was least frequent in the Wyoming, Idaho, Western North and South Dakota region and more frequent in the Southwest.

Traveling to see big cities was most frequent in Canada and least frequent in the Northwest and Wyoming, Idaho, Western North and South Dakota. The same pattern held true for visiting resorts.

Going to night clubs was least frequent in the Rockies and the Northwest. The other four regions all displayed a significantly higher response average.

### Travel Mode and Behavior

Seven questions were asked concerning the mode of travel, and these average responses are shown in Table III.3.

Only two of the variables displayed a statistically significant difference across regions. In terms of traveling long distances, 83% of the sample reported that they did so sometimes or often. The Minnesota, Wisconsin, Eastern North and South Dakota regions and the Wyoming, Idaho, Western North and South Dakota regions had a slightly lower tendency to do so while Canada had a slightly higher tendency to travel long distances.

The second variable which showed some regional differences was traveling by air. Canada and the Southwest had the highest average frequency with 72% of respondents traveling by air sometimes or often compared to a total sample percentage of 60%. The lowest region was Wyoming, Idaho, Western North and South Dakota with 43% traveling by air sometimes or often. The two Midwest regions also had somewhat lower averages.

### Vacation Planning and Patterns

This section examines several issues relating to vacation planning and the pattern of vacations over the last two years (Table III.4).

In terms of helping people decide where they travel, the advice of friends is sought more frequently than books/articles and much more than travel agents. Yet, only the latter shows any difference across regions. The use of travel agents is about the same in all regions except Wyoming, Idaho, and Western North and South Dakota, which use them less.

The lead time in deciding on where to go is approximately 3.3 months prior to travel and does not differ across regions.

Individuals were asked a number of questions concerning their vacation trips

TABLE III.3  
TRAVEL MODE AND BEHAVIOR  
AVERAGE RATING BY REGION

TRAVEL MODE	REGION											TOTAL SAMPLE
	MINN WIS EASTERN	WYO IDAHO WESTERN	WASH ORE NEV	SO CAL AZ NM	CANADA (ALBERTA SASKAT- CHEWAN)	IND ILL S.D.	N.D. AND S.D.	UTAH CAL	NORTHERN WEST TEX	COLO UTAH	NEV CAL	
TRAVEL LONG DISTANCES	3.05	3.27	3.13	3.32	3.21	3.29	3.36	***	3.23			
TRAVEL BY AIR	2.52	2.59	2.39	2.76	2.76	3.03	3.02	***	2.73			
TRAVEL BY BUS	1.47	1.45	1.32	1.38	1.38	1.45	1.54	1.43				
TRAVEL BY TRAIN	1.31	1.41	1.21	1.34	1.44	1.31	1.37	1.35				
TRAVEL BY MOTORCYCLE	1.31	1.27	1.32	1.32	1.32	1.24	1.21	1.28				
TRAVEL BY CAR	3.70	3.72	3.76	3.65	3.71	3.67	3.66	3.70				
GROUP TOURS	1.61	1.66	1.42	1.46	1.37	1.53	1.47	1.51				

Rating Scale: never = 1 rarely = 2 sometimes = 3 often = 4

STATISTICAL SIGNIFICANCE:

\*\*\*p < .001

\*\* p < .01

\* p < .05

E III.4  
VACATION PLANNING PATTERNS  
AVERAGE RESPONSE BY REGION

	REGION											
	MINN WIS	WYO	IDAHO	WASH ORE	CANADA							
	EASTERN	WESTERN	NEV	SO CAL	(ALBERTA							
	N.D. AND	MICH	N.D. AND	NORTHERN	SASKAT-							
	S.D.	ILL	S.D.	CAL	CHewan)							
	USE TRAVEL AGENTS	2.40	2.32	2.00	2.34	2.21	2.37	2.45	**	2.31		
	READ BOOKS OR											
	ARTICLES	3.04	3.19	3.03	3.11	3.06	3.20	3.14		3.11		
	SEEK FRIENDS ADVICE	3.32	3.22	3.22	3.35	3.16	3.22	3.14		3.23		
	DESTINATION DECISION											
	MONTHS IN ADVANCE	3.49	3.55	2.97	3.22	3.19	3.64	3.34		3.35		
	NUMBER OF OUT OF											
	STATE VACATIONS	3.44	4.43	3.83	5.13	3.67	3.59	4.11	*	4.01		
	HOW MANY IN WINTER	1.16	1.39	1.45	1.83	1.23	1.35	1.59		1.42		
	HOW MANY IN SUMMER	2.35	2.80	2.42	3.18	2.47	2.32	2.43		2.56		
	DAYS AWAY ON LAST											
	VACATION	15.40	12.71	14.88	13.41	15.92	14.90	16.08		14.79		

Rating Scale for Travel Agents, Books, Friends: never = 1 rarely = 2 sometimes = 3 often = 4  
STATISTICAL SIGNIFICANCE:

\*\*\*P < .001

\*\* P < .01

\* P < .05

in the last two years. The average number of vacation trips was four with some regional differences. For example, Colorado/Utah reported an average of more than five trips while the near Midwest region of Wisconsin, Minnesota, Eastern Dakotas averaged 3.4 vacations.

The relationship between winter and summer vacations were fairly constant across regions with some exceptions. Colorado/Utah took more winter vacations, and the near Midwest region of Wisconsin, Minnesota, and Eastern Dakotas averaging the least. This also held true for summer vacations.

The average number of days people were gone from home on their last vacation averaged almost 15 days with no significant differences across regions.

#### Perceptions of Montana

A total of thirteen questions were asked concerning people's perceptions of various attributes of Montana (Table III.5). The most interesting finding is that many of the highest ratings showed little or no significant difference across regions. Therefore, these perceptions are not only quite high but are widely held. These were ratings of Montana as a place:

1. with friendly people,
2. for rest and relaxation,
3. for a family vacation,
4. with a variety of vacation activities.

Many other attributes received high ratings with only one or two regions differing in their ratings of Montana. For example, Canada rated Montana significantly lower on Montana as a scenic place to visit and also as a place to get good value for your vacation dollar. On the plus side, Canada rated Montana's hotels and motels higher than any of the other regions. The lowest hotel and motel ratings were in the Northwest and Southwest regions.

As a place to enjoy outdoor recreation received the highest ratings of any

## PERCEPTIONS OF MONTANA (AVERAGE RATING BY REGION)

REGION																

Rating Scale: poor = 1 fair = 2 good = 3 excellent = 4 (don't know excluded)

STATISTICAL SIGNIFICANCE:

\*\*\*P < .001

\*\* P < .01

\* P < .05

attribute. Here again, the Northwest and Canada rated Montana slightly lower, with the Southwest and Colorado/Utah rating Montana a bit higher than the other regions.

In terms of rating Montana as an overall vacation place, the Northwest and Southwest regions Montana significantly lower than the other regions.

Rating Montana as a place with interesting historical sites received slightly lower ratings in the Southwest, Northwest, and Canada.

Montana received generally lower ratings, in the fair to good range, on three attributes:

1. as a place with good restaurants,
2. climate,
3. as a place that's easy to get to.

Two regions, the Northwest and Southwest, rated Montana significantly lower on both climate and restaurants. The attribute of a place that is easy to get to displayed the greatest variability across regions. The ratings appear to be very closely related to the actual distance from Montana as the far Midwestern region of Michigan, Illinois, Indiana and the Southwest rated Montana much lower than the adjacent region of Wyoming, Idaho, and Western Dakotas or Canada.

#### Montana Vacation Potential

A number of questions were asked concerning a potential Montana vacation, all of which showed significant regional differences (Table III.6).

Individuals were asked to estimate the number of days it would take to drive directly to Montana and how long their Montana vacation would be. Both of these are very closely related to the actual distance from Montana - increasing as one moves further away from Montana.



TABLE III.6  
MONTANA VACATION POTENTIAL

	REGION										TOTAL SAMPLE
	MINN WIS EASTERN N.D. AND S.D.	IND ILL.	MICH S.D.	WYO IDAHO WESTERN N.D. AND S.D.	UTAH	COLO NORTHERN CAL	WASH ORE NEV NORTHERN CAL	SO CAL AZ NM WEST TEX	CANADA (ALBERTA SASKAT- CHEVAN)		
ESTIMATED DRIVING DAYS TO MONTANA	2.33	2.76		1.21	1.95	2.32		2.84	1.53	***	2.14
ESTIMATED DAYS ON MONTANA VACATION	10.08	11.43		8.02	8.83	10.30		11.66	8.56	***	9.86
CHANCE OF VISITING YELLOWSTONE PARK	2.14	2.14		2.70	2.70	2.22		2.30	2.33	***	2.34
CHANCE OF VISITING GLACIER PARK	2.11	1.95		2.53	2.25	2.04		2.14	2.49	***	2.21
CHANCE OF VISITING MONTANA	2.26	2.04		3.05	2.56	2.28		2.18	2.77	***	2.44

Rating Scale for Chance: very low = 1 low = 2 high = 3 very high = 4 (don't know excluded)

STATISTICAL SIGNIFICANCE:

\*\*\*P < .001

\*\* P < .01

\* P < .05

Individuals were also asked to rate their chances of visiting Yellowstone and Glacier National Parks, and Montana in the next two years. In general, the adjacent areas of Wyoming, Idaho, Western Dakotas, Colorado/Utah rated their chances as higher than the other regions. It is important to note that the average chance was close to low for many of the regions (Table III.6).

CHAPTER IV  
CAMPERS AS A VERTICAL SEGMENT

Introduction

Vertical Markets, those defined around vacation activities, are an important aspect of the promotional strategy. Montana offers an abundance of opportunity for both outdoor activities, such as camping, fishing and skiing, and the more leisurely activities such as "seeing the sights," be it touring the mountains or plains, visiting historic sites, or the national or state parks of Montana. There are two ways to look at these vertical market segments depending upon the purpose at hand. The first is to select an activity, camping for example, and aim the marketing strategy at those who engage in the activity. The implementation of the strategy requires knowledge of the perceptions, attitudes, behavior, and characteristics of the segment and particularly how they differ from those who do not engage in the activity. The next five chapters examine key vacation activities from this point of view. Those who engage in the activity of special interest "often or sometimes" are contrasted to those who rarely or never engage in the activities.

A major difficulty with this viewpoint arises because the market is being arbitrarily cut into overlapping segments, which are not a natural base. As a consequence, it is difficult to know where to start and stop segmenting. Should the segment of "Fishermen," for example, be combined with hunters? Or should it be further refined to stream fishing. Whatever the decision, there is inherently a large overlap because the same market is being used as the starting point, so while campers can be contrasted to non-campers, there is great

difficulty contrasting them to fishermen because some people do both, and others do neither. The contrast then would frequently be examining not different markets, but the same market.

This problem is addressed in Chapter 9 of the study by examining the activities for interrelationships and grouping those that are highly interrelated. The sets of segments are then used to classify each respondent into one and only one of the activity segments. These segments, because of the lack of overlap, can be contrasted.

### Examination of Campers as a Vertical Segment

Camping is a very important aspect of Montana travel. There are many reasons to camp - incidental to other activities or as the major goal. It is, therefore, reasonable to expect campers to be a diverse group.

Campers, as shown in Table IV.1, are very active in all outdoor recreation activities. They are more apt to engage in any of the activities than non-campers. The difference is especially high for fishing, hunting, hiking, and boating.

TABLE IV.1  
OUTDOOR RECREATION ACTIVITIES  
AVERAGE RATING BY CAMPERS

ACTIVITY	GO CAMPING		TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES OR OFTEN	
SPEND TIME AT BEACH	2.57	2.84**	2.71
GO SKIING	1.81	2.16**	2.00
SNOWMOBILING	1.39	1.51**	1.45
GO FISHING	2.19	3.02**	2.64
GO HUNTING	1.52	2.09**	1.83
HIKE, CLIMB OR PACK	1.79	2.39**	2.12
GO BOATING, CANOE OR RAFT	2.12	2.70**	2.43

Rating Scale: never = 1 rarely = 2 sometimes = 3 often = 4  
STATISTICAL SIGNIFICANCE:\*p < .05, \*\*p < .01

TABLE IV.2  
VACATION OR PLEASURE TRIP ACTIVITIES  
AVERAGE RESPONSE BY CAMPERS

ACTIVITY	GO CAMPING		TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES OR OFTEN	
VISIT MUSEUMS	2.78	2.78	2.78
PLAY GOLF	1.95	1.76*	1.85
TRAVEL TO SIGHTSEE	3.33	3.34	3.34
VISIT A RESORT	2.47	2.47	2.47
NAT. OR STATE PARKS	2.83	3.36**	3.11
SEE BIG CITIES	2.53	2.45	2.49
VISIT HISTORIC PLACES	2.97	3.06*	3.02
FINE RESTAURANTS	2.90	2.78	2.84
NIGHT CLUBS	2.13	2.22*	2.18

Rating scale: never = 1 rarely = 2 sometimes = 3 often = 4  
STATISTICAL SIGNIFICANCE: \*p < .05, \*\*p < .01

As one would expect, Table IV.2 shows that campers are much more apt to visit national or state parks when vacationing than non-campers, but somewhat surprisingly report a slightly higher frequency of visiting night clubs and visiting historic places. While less apt to play golf, the frequency with which they engage in other vacation activities is similar to non-campers.

TABLE IV.3  
TRAVEL MODE AND BEHAVIOR  
AVERAGE RATING BY CAMPERS

TRAVEL MODE	GO CAMPING		TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES OR OFTEN	
TRAVEL LONG DISTANCES	3.19	3.28**	3.23
TRAVEL BY AIR	2.90	2.58**	2.73
TRAVEL BY BUS	1.43	1.44	1.43
TRAVEL BY TRAIN	1.33	1.36	1.35
TRAVEL BY MOTORCYCLE	1.18	1.37	1.28
TRAVEL BY CAR	3.59	3.79	3.70
GROUP TOURS	1.58	1.44	1.51

Rating Scale: never = 1 rarely = 1 sometimes = often = 4  
STATISTICAL SIGNIFICANCE: \*p < .05, \*\*p < .01

Predictably Table IV.3 shows that the travel patterns of campers are more oriented toward cars than airplanes, are more apt to travel long distances when vacationing and less apt to travel with a group tour. They are active travelers.

TABLE IV.4  
VACATION PLANNING AND PATTERNS  
AVERAGE RESPONSE BY CAMPERS

	GO CAMPING		TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES OR OFTEN	
USE TRAVEL AGENTS	2.47	2.17	2.31
READ BOOKS OR ARTICLES	3.00	3.21	3.11
SEEK FRIENDS ADVICE	3.09	3.34	3.23
DESTINATION DECISION MONTHS IN ADVANCE	3.50	3.22	3.35
NUMBER OF OUT OF STATE VACATIONS	3.76	4.23	4.01
HOW MANY IN WINTER	1.38	1.46	1.42
HOW MANY IN SUMMER	2.16	2.91	2.56
DAYS AWAY ON LAST VACATION	15.58	14.10*	14.79

Rating Scale for Travel Agents, Books, Friends:

never = 1   rarely = 2   sometimes = 3   often = 4

STATISTICAL SIGNIFICANCE:\*p < .05, \*\*p < .01

They made (Table IV.4) an average of 4.23 out of state trips in the last two years or camped to 3.76 for non-campers, and this difference is concentrated during the summer months. The length of the vacation trip was 1.5 days shorter (14.1 days for campers, 15.6 days for non-campers).



TABLE IV.5  
PERCEPTIONS OF MONTANA  
AVERAGE RATING BY CAMPERS

RATING OF MONTANA AS A PLACE	GO CAMPING		TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES OR OFTEN	
SCENIC PLACE TO VISIT	3.34	3.40	3.37
GOOD DOLLAR VALUE	2.93	2.94	2.94
FRIENDLY PEOPLE	3.33	3.29	3.31
HISTORICAL SITES	3.00	3.03	3.02
ENJOY OUTDOOR REC.	3.47	3.61**	3.55
VARIETY OF VAC. ACTIVITIES	2.98	3.14	3.07
GOOD RESTAURANTS	2.73	2.75	2.74
FAMILY VACATION	3.24	3.35	3.30
HOTEL AND MOTELS	2.91	2.96	2.94
CLIMATE	2.70	2.82	2.77
REST RELAX	3.23	3.38**	3.31
EASY TO GET TO	2.45	2.63*	2.55
OVERALL VACATION PLACE	2.96	3.16*	3.07

Rating Scale: Poor = 1 Fair = 2 Good = 3 Excellent = 4  
(don't know excluded)

STATISTICAL SIGNIFICANCE: \*p < .05, \*\*p < .01

Campers rate Montana as an excellent place to camp, 3.51, and as a place to enjoy outdoor recreation, 3.61. In general, campers' ratings were above non-campers, especially for the key camping attributes of "rest and relaxation," "easy to get to," and overall vacation place.

TABLE IV.6  
MONTANA VACATION POTENTIAL

	GO CAMPING		TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES OR OFTEN	
ESTIMATED DRIVING DAYS TO MONTANA	2.26	2.05*	2.14
ESTIMATED DAYS ON MONTANA VACATION	9.41	10.25*	9.86
CHANCE OF VISITING YELLOWSTONE PARK	2.12	2.53**	2.34
CHANCE OF VISITING GLACIER PARK	2.03	2.36**	2.21
CHANCE OF VISITING MONTANA	2.25	2.60**	2.44

Rating Scale for Chance: Very Low = 1 Low = 2 High = 3 Very High = 4  
(don't know excluded)

STATISTICAL SIGNIFICANCE: \*p < .05, \*\*p < .01

Campers estimate a shorter driving time to, and longer vacation in Montana than non-campers, and place the chance of visiting Yellowstone, Glacier, and Montana higher than non-campers.

#### Demographics

Somewhat surprisingly, single people (Table IV.7) camp somewhat more than married. For example, 33% of the singles often camp, while 25% of the married respondents do. The number of children is also related to the frequency of camping (Table IV.8). Probably reflecting the propensity of singles to camp, those with no children camp about average, but once families have children, the more children they have, the more they report camping "often."

Age (Table IV.9) is inversely related to camping; older people camp less

frequently than younger people. For example, 37% of respondents under 20 reported camping "often," while only 19% of those 60 and over reported camping often. Middle income (\$20,000-40,000) were found to camp more frequently than other income categories (Table IV.10). Those living in a rural area are slightly more apt to be campers. Education was not found to be related to the frequency of camping, but occupation was (Table IV.11). White collar occupations were near average, blue collar occupations were above (approximately 41% compared to 27%), while retired were substantially below average (yet 19% still report camping often).

TABLE IV.7  
MARITAL STATUS OF CAMPERS

	MARITAL STATUS			TOTAL SAMPLE
	SINGLE	MARRIED	DIVORCED OR SEPARATED	
			PERCENT	
	PERCENT	PERCENT	PERCENT	PERCENT
GO CAMPING				
NEVER OR RARELY	35.2	48.2	54.1	45.8
SOMETIMES	31.9	26.8	19.3	27.1
OFTEN	33.0	25.0	26.7	27.1

STATISTICAL SIGNIFICANCE:  $P=.02$

TABLE IV.8  
CHILDREN BY CAMPING

	NUMBER OF CHILDREN				TOTAL SAMPLE
	NO CHILDREN	ONE CHILD	TWO CHILDREN	THREE OR MORE CHILDREN	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT
GO CAMPING					
NEVER OR RARELY	48.0	47.4	44.2	37.7	45.8
SOMETIMES	25.7	31.0	26.3	28.1	27.1
OFTEN	26.4	21.6	29.5	34.2	27.1

STATISTICAL SIGNIFICANCE:  $P=.05$

TABLE IV.9  
AGE OF CAMPERS

	AGE OF RESPONDENT					TOTAL SAMPLE
	UNDER 20	20 TO 29	30 TO 44	45 TO 59	60 AND OVER	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT
GO CAMPING						
NEVER OR RARELY	36.5	33.1	44.5	55.0	63.9	45.8
SOMETIMES	27.0	35.1	26.9	23.8	17.1	27.1
OFTEN	36.5	31.8	28.6	21.2	19.0	27.1

STATISTICAL SIGNIFICANCE:  $P=.000$

TABLE IV.10  
INCOME OF CAMPERS

	INCOME RANGE						TOTAL SAMPLE
	REFUSED	LESS THAN 20K	20 TO 30K	30 TO 40K	40 TO 50K	OVER 50K	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	
GO CAMPING							
NEVER OR RARELY	57.9	49.0	37.8	38.9	45.8	58.1	45.8
SOMETIMES	23.2	27.2	30.1	28.6	27.5	21.8	27.1
OFTEN	18.9	23.8	32.1	32.5	26.8	20.1	27.1

STATISTICAL SIGNIFICANCE: P=.000

TABLE IV.11  
OCCUPATION OF CAMPERS

	OCCUPATION OF RESPONDENT								TOTAL SAMPLE
	HIGH WHITE	MOD. WHITE	LOW WHITE	HIGH BLUE	MOD. BLUE	LOW BLUE	STUDENT	RETIRED	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	
GO CAMPING									
NEVER OR RARELY	45.5	46.2	47.3	34.8	36.7	25.0	34.8	62.2	45.8
SOMETIMES	27.8	28.8	26.1	22.8	23.3	31.2	36.2	18.9	27.1
OFTEN	26.8	25.0	26.6	42.4	40.0	43.7	29.0	18.9	27.1

STATISTICAL SIGNIFICANCE: P=.000

### Summary

Campers are active in a variety of outdoor activities and willing to travel long distances to enjoy their activity. They travel more often than non-campers and take shorter trips. They rate Montana high as a place to camp, enjoy outdoor recreation, and as a place for rest and relaxation. They see their chance of visiting Montana significantly higher than non-campers.

Campers tend to be younger, middle income with blue collar occupations. Singles camp somewhat more frequently than married people, but increasing family size also increases the tendency to camp.

## CHAPTER V

### FISHING AS A VERTICAL SEGMENT

Montana is known for fine trout fishing, and this has long been considered a major tourist draw. The habits and perception of fishermen are of special importance to this study. Fishing, however, has many connotations to different people. To many it is a pleasant family activity, which in many of the regions studied would probably be considered with a picnic or camping trip. To others it is a demanding sport taken very seriously. The basis of classifying "fishermen" in this study corresponds more closely to the first more casual type. A household member responded to the survey, and this need not have been the "fishermen."

The interrelationship between camping and fishing also presents technical problems. It was found that about 60% of campers fish (and vice versa), so the responses of fishermen will be interrelated to campers simply because frequently they are the same responses.

These problems are partially addressed by using a different format for examining the fishing segment. The tables for the other vertical segments use a yes/no format by grouping the respondents who answered never or rarely, and those who answered sometimes or often. In the following tables the second category will be split so that the perceptions of those who fish "often" can be contrasted. This format allows a closer look at the fishing segment, but it must be kept in mind that even the "often" group is large (33% of respondents) and consequently, still is a very general mix of fishermen, certainly not "fly fishing purists."

Fishermen, like campers, are active in all the outdoor activities (Table V.1). Those that fish "often" are particularly apt to go camping, hunting, and boating.

TABLE V.1  
OUTDOOR RECREATIONS ACTIVITIES  
AVERAGE RATING BY FISHING

	GO FISHING			TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES	OFTEN	
SPEND TIME AT BEACH	2.67	2.73	2.76**	2.71
GO CAMPING	2.12	2.52	3.10**	2.54
GO SKIING	1.94	2.03	2.04**	2.00
SNOWMOBILING	1.33	1.51	1.58**	1.45
GO HUNTING	1.33	1.82	2.49**	1.83
HIKE, CLIMB OR PACK	2.01	2.11	2.26**	2.12
GO BOATING, CANOE OR RAFT	2.11	2.43	2.86**	2.43

Rating Scale: never = 1 rarely = 2 sometimes = 3 often = 4  
STATISTICAL SIGNIFICANCE: \*p < .05, \*\*p < .01



TABLE V.2  
VACATION OR PLEASURE TRIP ACTIVITIES  
AVERAGE RESPONSE BY FISHING

ACTIVITY	GO FISHING			TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES	OFTEN	
VISIT MUSEUMS	2.81	2.86	2.68	2.78
PLAY GOLF	1.82	1.83	1.88	1.85
TRAVEL TO SIGHTSEE	3.33	3.33	3.35	3.34
VISIT A RESORT	2.45	2.47	2.49	2.47
NAT. OR STATE PARKS	2.99	3.03	3.35**	3.11
SEE BIG CITIES	2.63	2.49	2.31**	2.49
VISIT HISTORIC PLACES	2.99	2.98	3.08	3.02
FINE RESTAURANTS	2.88	2.84	2.77	2.84
NIGHT CLUBS	2.13	2.17	2.24	2.18

Rating Scale: never = 1 rarely = 2 sometimes = 3 often = 4  
STATISTICAL SIGNIFICANCE \*p < .05, \*\*p < .01

The vacation activities of fishermen (Table V.2) differ from non-fisherman only by being more apt to visit national or state parks and less apt to travel to see big cities.

TABLE V.3  
TRAVEL MODE AND BEHAVIOR  
AVERAGE RATING BY FISHING

TRAVEL MODE	GO FISHING			TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES	OFTEN	
TRAVEL LONG DISTANCES	3.24	3.12	3.31*	3.23
TRAVEL BY AIR	2.92	2.69	2.51**	2.73
TRAVEL BY BUS	1.45	1.41	1.43	1.43
TRAVEL BY TRAIN	1.36	1.33	1.34	1.35
TRAVEL BY MOTORCYCLE	1.25	1.27	1.34	1.28
TRAVEL BY CAR	3.60	3.69	3.83	3.70
GROUP TOURS	1.56	1.41	1.51	1.51

Rating Scale: never = 1 rarely = 2 sometimes = 3 often = 4  
 STATISTICAL SIGNIFICANCE: \*p < .05, \*\*p < .01

The travel mode of fishermen (Table V.3) is similar to that of non-fishermen, but there is a slight tendency to travel more by car and less by air.

TABLE V.4  
VACATION PLANNING AND PATTERNS  
AVERAGE RESPONSE BY REGION

	GO FISHING			TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES	OFTEN	
USE TRAVEL AGENTS	2.47	2.32	2.09*	2.31
READ BOOKS OR ARTICLES	3.10	3.10	3.14	3.11
SEEK FRIENDS ADVICE	3.14	3.22	3.34*	3.23
DESTINATION DECISION MONTHS IN ADVANCE	3.30	3.36	3.42	3.35
NUMBER OF OUT OF STATE VACATIONS	3.94	3.69	4.34*	4.01
HOW MANY IN WINTER	1.43	1.26	1.53	1.42
HOW MANY IN SUMMER	2.37	2.40	2.92	2.56
DAYS AWAY ON LAST VACATION	14.61	14.20	15.47	14.79

Rating Scale for Travel Agents, Books, Friends:

never = 1   rarely = 2   sometimes = 3   often = 4

STATISTICAL SIGNIFICANCE \*p < .05, \*\*p < .01

Fishermen, probably because of the tendency to fly less, are slightly less apt to use travel agents. They are also slightly more prone to seek friends' advice. Active fishermen, like campers, take more out of state vacations, especially in the summer. In contrast to campers, who took shorter trips, active fishermen may take longer trips (the difference, however, is small and could easily be due to random sampling errors).

TABLE V.5  
PERCEPTIONS OF MONTANA  
AVERAGE RATING BY FISHING

RATING OF MONTANA AS A PLACE	GO FISHING			TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES	OFTEN	
SCENIC PLACE TO VISIT	3.41	3.25	3.41*	3.37
GOOD DOLLAR VALUE	2.97	2.92	2.92	2.94
FRIENDLY PEOPLE	3.32	3.29	3.31	3.31
HISTORICAL SITES	2.96	2.97	3.13	3.02
ENJOY OUTDOOR REC.	3.51	3.52	3.62	3.55
VARIETY OF VAC. ACTIVITIES	3.02	3.02	3.15	3.07
GOOD RESTAURANTS	2.68	2.75	2.80	2.74
FAMILY VACATION	3.28	3.30	3.33	3.30
HOTEL AND MOTELS	2.91	2.96	2.95	2.94
CLIMATE	2.74	2.76	2.81	2.77
REST RELAX	3.26	3.28	3.39	3.31
EASY TO GET TO	2.48	2.57	2.63	2.55
OVERALL VACATION PLACE	3.06	3.14	3.06	3.07

Rating Scale: poor = 1 fair = 2 good = 3 excellent = 4  
(don't know excluded)

STATISTICAL SIGNIFICANCE \*p < .05, \*\*p < .01

Given the fishing opportunities that Montana offers, one would expect that fishermen would have above average perceptions of Montana. Surprisingly, this was not the case. Fishermen's rating of Montana was nearly identical to average. The one minor exception as a scenic place to

visit, where the subgroup which fished "sometimes" rating was below average. Fishermen, rated Montana high, 3.54, as a place to go fishing.

TABLE V.6  
MONTANA VACATION POTENTIAL

	GO FISHING			TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES	OFTEN	
ESTIMATED DRIVING DAYS TO MONTANA	2.22	2.17	2.02	2.14
ESTIMATED DAYS ON MONTANA VACATION	9.61	9.87	10.18	9.86
CHANCE OF VISITING YELLOWSTONE PARK	2.24	2.26	2.53**	2.34
CHANCE OF VISITING GLACIER PARK	2.14	2.15	2.34**	2.21
CHANCE OF VISITING MONTANA	2.35	2.40	2.58**	2.44

Rating Scale for Chance: very low = 1 low = 2 high = 3 very high = 4  
(don't know excluded)

STATISTICAL SIGNIFICANCE:\*p < .05, \*\*p < .01

Fishermen rated their chance of visiting Yellowstone, Glacier, and Montana higher than non-fishermen.

### Demographics

The tendency to go fishing was not related to marital status, but was affected by the other demographic characteristics. The more children, the more apt to go fishing (Table V.7). Younger people (Table V.8) are more apt to fish. Men are more apt to be active fishermen (Table V.9), as are those who live in rural areas (Table V.10).

College graduates fish less frequently than average, and those who attended technical school fish above average (Table V.11). In keeping with the education trends, white collar occupations (Table V.12) tend to fish less frequently (yet 30% report fishing "often"), while blue collar occupations are above average. As in the case of campers, middle income (Table V.13) households (\$20,000 - \$40,000) report fishing frequency above average -- Yet 24% of those over \$50,000 "often" go fishing.

TABLE V.7  
CHILDREN BY FISHING

	NUMBER OF CHILDREN				TOTAL SAMPLE
	NO CHILDREN	ONE CHILD	TWO CHILDREN	THREE OR MORE CHILDREN	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT
GO FISHING					
NEVER OR RARELY	49.2	42.7	33.5	34.2	43.0
SOMETIMES	20.7	25.8	28.1	27.4	24.0
OFTEN	30.1	31.5	38.4	38.4	33.0

STATISTICAL SIGNIFICANCE:  $P=.003$

TABLE V.8  
AGE OF FISHERMEN

	AGE OF RESPONDENT					TOTAL SAMPLE
	UNDER 20	20 TO 29	30 TO 44	45 TO 59	60 AND OVER	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT
GO FISHING						
NEVER OR RARELY	30.2	40.3	39.9	48.9	52.5	43.0
SOMETIMES	23.8	23.0	26.6	23.4	20.3	24.0
OFTEN	46.0	36.7	33.5	27.7	27.2	33.0

STATISTICAL SIGNIFICANCE:  $P=.007$

TABLE V.9  
SEX OF FISHERMEN

	SEX		TOTAL SAMPLE
	MALE	FEMALE	
	PERCENT	PERCENT	PERCENT
GO FISHING			
NEVER OR RARELY	37.0	46.4	43.0
SOMETIMES	22.5	24.7	24.0
OFTEN	40.6	28.8	33.0

STATISTICAL SIGNIFICANCE:  $P=.000$

TABLE V.10  
URBAN/RURAL BY FISHING

	URBAN OR RURAL		TOTAL SAMPLE
	RURAL	URBAN	
	PERCENT	PERCENT	PERCENT
GO FISHING			
NEVER OR RARELY	34.3	47.8	43.0
SOMETIMES	26.4	22.6	24.0
OFTEN	39.3	29.6	33.0

STATISTICAL SIGNIFICANCE: P=.000

TABLE V.11  
EDUCATION OF FISHERMEN

	EDUCATION						TOTAL SAMPLE
	LESS THAN HS	HIGH SCHOOL	SOME COLLEGE	COLLEGE GRAD	GRADUATE SCHOOL	TECHNICAL SCHOOL	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT
GO FISHING							
NEVER OR RARELY	41.7	37.4	40.3	49.8	58.9	33.3	43.0
SOMETIMES	27.4	26.1	21.2	22.7	25.6	25.0	24.0
OFTEN	31.0	36.5	38.5	27.5	15.6	41.7	33.0

STATISTICAL SIGNIFICANCE: P=.000



TABLE V.12  
OCCUPATION OF FISHERMEN

	OCCUPATION OF RESPONDENT								
	HIGH WHITE	MOD. WHITE	LCW WHITE	HIGH BLUE	MOD. BLUE	LCW BLUE	STUDENT	RETIRED	TOTAL SAMPLE
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT
GO FISHING									
NEVER OR RARELY	47.4	48.7	46.2	32.6	28.3	31.2	30.4	48.8	43.0
SOMETIMES	23.0	23.1	23.5	25.0	25.0	31.2	27.5	17.3	24.0
OFTEN	29.7	28.2	29.8	42.4	46.7	37.5	42.0	33.9	33.0

STATISTICAL SIGNIFICANCE:  $P=.019$

TABLE V.13  
INCOME OF FISHERMEN

	INCOME RANGE						TOTAL SAMPLE
	REFUSED	LESS THAN 20K	20 TO 30K	30 TO 40K	40 TO 50K	OVER 50K	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	
GO FISHING							
NEVER OR RARELY	41.1	47.0	38.2	34.6	48.6	54.2	43.0
SOMETIMES	31.6	19.8	26.0	25.2	21.1	21.8	24.0
OFTEN	27.4	33.2	35.8	40.2	30.3	24.0	33.0

STATISTICAL SIGNIFICANCE:  $P=.003$

### Summary

Fishermen are active in other outdoor activities and are strongly attracted to parks. They tend to prefer traveling by car. Their vacation planning does not differ from non-fishermen, but active fishermen do take slightly more and out of state vacations. Somewhat surprisingly, the perception of Montana by fishermen did not vary from non-fishermen. Fishermen did, however, rate their chance of visiting Montana higher than non-fishermen.

Men are more likely to report that they often fish. Fishing is enjoyed by all demographic groups but is somewhat more prevalent among younger, middle income, blue collar families.

# CHAPTER VI

## SKIERS AS A VERTICAL MARKET SEGMENT

Skiers are an important market segment even though smaller than the other vertical segments examined in this study. They come during the "off" season for most of the tourist industry, their sport is an expensive one, and associated with other expensive activities. Skiers are more active in outdoor activities, Table VI.1, than non-skiers; the only exception is fishing where the slight increase could be due to sampling error.

TABLE VI.1  
OUTDOOR RECREATION ACTIVITIES  
AVERAGE RATING BY SKIING

	GO SKIING		TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES OR OFTEN	
SPEND TIME AT BEACH	2.55	3.05**	2.71
GO CAMPING	2.42	2.78**	2.54
SNOWMOBILING	1.39	1.58**	1.45
GO FISHING	2.60	2.71	2.64
GO HUNTING	1.80	1.89*	1.83
HIKE, CLIMB OR PACK	1.95	2.45**	2.12
GO BOATING, CANOE OR RAFT	2.19	2.92**	2.43

Rating Scale: never = 1 rarely = 2 sometimes = 3 often = 4  
STATISTICAL SIGNIFICANCE: \*p < .05, \*\*p < .01

TABLE VI.2  
VACATION OR PLEASURE TRIP ACTIVITIES  
AVERAGE RESPONSE BY SKIING

ACTIVITY	GO SKIING		TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES OR OFTEN	
VISIT MUSEUMS	2.81	2.72	2.78
PLAY GOLF	1.75	2.05**	1.85
TRAVEL TO SIGHTSEE	3.37	3.28	3.34
VISIT A RESORT	2.32	2.76**	2.47
NAT. OR STATE PARKS	3.04	3.26**	3.11
SEE BIG CITIES	2.44	2.59**	2.49
VISIT HISTORIC PLACES	3.04	2.97	3.02
FINE RESTAURANTS	2.77	2.97**	2.84
NIGHT CLUBS	2.08	2.36**	2.18

Rating Scale: never = 1 rarely = 2 sometimes = 3 often = 4  
 STATISTICAL SIGNIFICANCE:\*p < .05, \*\*p < .01

Skiers naturally have a higher tendency to visit a resort, but also are more apt than non-skiers to play golf, visit parks, night clubs and go out of their way to dine at fine restaurants while on vacation (Table VI.2)

TABLE VI.3  
TRAVEL MODE AND BEHAVIOR  
AVERAGE RATING BY SKIING

TRAVEL MODE	GO SKIING		TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES OR OFTEN	
TRAVEL LONG DISTANCES	3.18	3.34**	3.23
TRAVEL BY AIR	2.62	2.94**	2.73
TRAVEL BY BUS	1.46	1.38	1.43
TRAVEL BY TRAIN	1.32	1.39	1.35
TRAVEL BY MOTORCYCLE	1.25	1.34	1.28
TRAVEL BY CAR	3.68	3.73	3.70
GROUP TOURS	1.53	1.45	1.51

Rating Scale: never = 1 rarely = 2 sometimes = 3 often = 4  
STATISTICAL SIGNIFICANCE:\*p < .05, \*\*p < .01

Skiers often travel long distances and by air more often than non-skiers (Table VI.3).

TABLE VI.4  
VACATION PLANNING PATTERNS  
AVERAGE RATING BY SKIING

	GO SKIING		TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES OR OFTEN	
USE TRAVEL AGENTS	2.26	2.41*	2.31
READ BOOKS OR ARTICLES	3.07	3.18*	3.11
SEEK FRIENDS ADVICE	3.16	3.36*	3.23
DESTINATION DECISION MONTHS IN ADVANCE	3.46	3.14	3.35
NUMBER OF OUT OF STATE VACATIONS	3.39	5.25*	4.01
HOW MANY IN WINTER	1.11	2.02	1.42
HOW MANY IN SUMMER	2.23	3.19	2.56
DAYS AWAY ON LAST VACATION	15.46	13.53	14.79

Rating Scale for Travel Agents, Books, Friends:

never = 1   rarely = 2   sometimes = 3   often = 4

STATISTICAL SIGNIFICANCE: \*p < .05, \*\*p < .01

Skiers are more apt to carefully plan their trips; they use travel agents more often, read books, and to seek advice from friends more often than non-skiers. They travel more often, (5.25 trips in the last two years compared to 3.39) especially in the winter but also in the summer. The trips are planned less far in advance and they averaged two days less on their last trip.

TABLE VI.5  
PERCEPTIONS OF MONTANA  
AVERAGE RATING BY SKIING

RATING OF MONTANA AS A PLACE	GO SKIING		TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES OR OFTEN	
SCENIC PLACE TO VISIT	3.36	3.39	3.37
GOOD DOLLAR VALUE	3.02	2.80*	2.94
FRIENDLY PEOPLE	3.33	3.26	3.31
HISTORICAL SITES	3.03	3.00	3.02
ENJOY OUTDOOR REC.	3.52	3.61	3.55
VARIETY OF VAC. ACTIVITIES	3.07	3.06	3.07
GOOD RESTAURANTS	2.79	2.66*	2.74
FAMILY VACATION	3.31	3.29	3.30
HOTEL AND MOTELS	2.98	2.86	2.94
CLIMATE	2.76	2.78	2.77
REST RELAX	3.29	3.35	3.31
EASY TO GET TO	2.56	2.53	2.55
OVERALL VACATION PLACE	3.00	3.12	3.07

Rating Scale: poor = 1 fair = 2 good = 3 excellent = 4  
(don't know excluded)

STATISTICAL SIGNIFICANCE:\*p < .05, \*\*p < .01

In general, skiers rate Montana, Table VI.5, slightly lower than non-skiers. In most cases the lower rating is so slight that random sampling errors can't be ruled out. The differences on the attributes "good dollar value," and "good restaurants," however, are statistically lower for skiers

than non-skiers, and except for "easy to get to," lower than all other attributes. Skiers did, however, give a high rating (3.35) to Montana as a place to ski.

TABLE VI.6  
MONTANA VACATION POTENTIAL

	GO SKIING		TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES OR OFTEN	
ESTIMATED DRIVING DAYS TO MONTANA	2.20	2.04*	2.14
ESTIMATED DAYS ON MONTANA VACATION	10.18	9.24*	9.86
CHANCE OF VISITING YELLOWSTONE PARK	2.28	2.46**	2.34
CHANCE OF VISITING GLACIER PARK	2.12	2.39**	2.21
CHANCE OF VISITING MONTANA	2.37	2.58**	2.44

Rating Scale for Chance: very low = 1 low = 2 high = 3 very high = 4  
(don't know excluded)  
STATISTICAL SIGNIFICANCE: \*p < .05, \*\*p < .01

Skiers estimated that it would take less time to drive to Montana, and like all their vacation trips, would spend less time than non-skiers if they vacationed in Montana. They rated the choice of visiting Yellowstone, Glacier and Montana higher than non-skiers.



## Demographics

Singles (Table VI.7) tend to ski more often (27%) than married, but somewhat surprisingly, the number of children (VI.8) does not affect the tendency to ski. Skiing is definitely a sport for the young: 35% of those under 20 "often" ski, whereas 14% of those 45-49 often ski. Skiing is not related to sex or whether they live in urban areas.

The level of education, occupation, and income all affect skiing, and follow just the opposite pattern from camping and fishing. As shown in Table VI.10, 27% of college graduates often ski, while 13% of those with high school education often ski. The higher the income level (Table VI.12) the more likely to ski. In the over \$50,000 bracket, 33% report skiing "often." Approximately 24% of those with white collar occupations "often" ski (Table VI.11), but only about 15% of blue collar occupations report skiing "often."

TABLE VI.7  
MARITAL STATUS OF SKIERS

	MARITAL STATUS			TOTAL SAMPLE
	SINGLE	MARRIED	DIVORCED OR SEPARATED	
	PERCENT	PERCENT	PERCENT	PERCENT
GO SKIING				
NEVER OR RARELY	53.1	70.5	72.6	66.6
SOMETIMES	19.4	14.1	10.4	14.9
OFTEN	27.5	15.4	17.0	18.5

STATISTICAL SIGNIFICANCE:  $P=.000$

TABLE VI.8  
CHILDREN BY SKIERS

	NUMBER OF CHILDREN				TOTAL SAMPLE
	NO CHILDREN	ONE CHILD	TWO CHILDREN	THREE OR MORE CHILDREN	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT
GO SKIING					
NEVER OR RARELY	67.4	64.8	61.6	74.0	66.6
SOMETIMES	13.8	18.3	18.3	8.9	14.9
OFTEN	18.8	16.9	20.1	17.1	18.5

STATISTICAL SIGNIFICANCE:  $P=.10$

TABLE VI.9  
AGE OF SKIERS

	AGE OF RESPONDENT					TOTAL SAMPLE
	UNDER 20	20 TO 29	30 TO 44	45 TO 59	60 AND OVER	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT
GO SKIING						
NEVER OR RARELY	46.0	52.8	66.5	74.9	89.9	66.6
SOMETIMES	19.0	23.3	14.3	11.3	3.8	14.9
OFTEN	34.9	23.9	19.2	13.9	6.3	18.5

STATISTICAL SIGNIFICANCE:  $P=.000$

TABLE VI.10  
EDUCATION OF SKIERS

	EDUCATION						TOTAL SAMPLE
	LESS THAN HS	HIGH SCHOOL	SOME COLLEGE	COLLEGE GRAD	GRADUATE SCHOOL	TECHNICAL SCHOOL	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	
GO SKIING							
NEVER OR RARELY	79.8	71.3	68.0	57.6	55.6	75.0	66.6
SOMETIMES	9.5	15.2	13.8	15.6	18.9	20.8	14.9
OFTEN	10.7	13.5	18.2	26.8	25.6	4.2	18.5

STATISTICAL SIGNIFICANCE:  $P=.000$

TABLE VI.11  
OCCUPATION OF SKIERS

	OCCUPATION OF RESPONDENT								TOTAL SAMPLE
	HIGH WHITE	MOD. WHITE	LOW WHITE	HIGH BLUE	MOD. BLUE	LOW BLUE	STUDENT	RETIRED	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	
GO SKIING									
NEVER OR RARELY	60.8	57.7	60.1	70.7	78.3	78.1	47.8	87.4	66.6
SOMETIMES	13.9	18.6	20.7	14.1	5.0	9.4	21.7	5.5	14.9
OFTEN	25.4	23.7	19.1	15.2	16.7	12.5	30.4	7.1	18.5

STATISTICAL SIGNIFICANCE:  $P=.000$

TABLE VI.12  
INCOME OF SKIERS

	INCOME RANGE						TOTAL SAMPLE
	REFUSED	LESS THAN 20K	20 TO 30K	30 TO 40K	40 TO 50K	OVER 50K	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT
GO SKIING							
NEVER OR RARELY	72.6	73.8	70.3	67.5	64.8	49.7	66.6
SOMETIMES	12.6	12.9	15.9	12.8	18.3	16.8	14.9
OFTEN	14.7	13.4	13.9	19.7	16.9	33.5	18.5

STATISTICAL SIGNIFICANCE: P=.000

#### Summary

Skiers are active in other outdoor activities. They have more cosmopolitan tastes than non-skiers - more likely to visit resorts, play golf, visit big cities, fine restaurants, and nightclubs. They travel longer distances and use airplanes more often than non-skiers. They are active information seekers and use travel agents, books, articles, and friends to obtain this information. Unfortunately, their perception of Montana is lower than that of non-skiers, especially for the attributes "good dollar value" and "good restaurants." They did, however, rate Montana above "good" (3.35 where 3 is good, 4 is excellent) as a place to ski and indicated above average chance of visiting Montana.

Skiers tend to be young, single, highly educated, and wealthy.

# CHAPTER VII

## HISTORIANS AS A VERTICAL SEGMENT

"Historians," those who visit historic places "sometimes or often," are more likely to go camping and hiking than non-historians, but less apt to ski and snowmobile. (Table VII.1)

TABLE VII.1  
OUTDOOR RECREATION ACTIVITIES  
AVERAGE RATING BY HISTORIC PLACES

ACTIVITY	VISIT HISTORIC PLACES		TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES OR OFTEN	
SPEND TIME AT BEACH	2.72	2.71	2.71
GO CAMPING	2.47	2.56*	2.54
GO SKIING	2.07	1.97	2.00
SNOWMOBILING	1.53	1.43*	1.45
GO FISHING	2.60	2.65	2.64
GO HUNTING	1.82	1.83	1.83
HIKE, CLIMB OR PACK	1.88	2.19**	2.12
GO BOATING, CANOE OR RAFT	2.44	2.43	2.43

Rating Scale: never = 1 rarely = 2 sometimes = 3 often = 4  
STATISTICAL SIGNIFICANCE: \*\*p < .01, \*p < .05

TABLE VII.2  
VACATION OR PLEASURE TRIP ACTIVITIES  
AVERAGE RESPONSE BY HISTORIC PLACES

ACTIVITY	VISIT HISTORIC PLACES		TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES OR OFTEN	
VISIT MUSEUMS	2.15	2.99**	2.78
PLAY GOLF	1.98	1.80*	1.85
TRAVEL TO SIGHTSEE	3.03	3.44**	3.34
VISIT A RESORT	2.47	2.47	2.47
NAT. OR STATE PARKS	2.77	3.23**	3.11
SEE BIG CITIES	2.24	2.57**	2.49
FINE RESTAURANTS	2.76	2.86**	2.84
NIGHT CLUBS	2.31	2.13**	2.18

Rating Scale: never = 1 rarely = 2 sometimes = 3 often = 4  
 STATISTICAL SIGNIFICANCE: \*\*p < .01, \*p < .05

Predictably historians are much more apt to visit museums while vacationing (Table VII.2), but they are also more likely to travel for sightseeing, visit national or state parks, go to big cities and seek out fine restaurants. They show less interest in golf and night clubs.

TABLE VII.3  
TRAVEL MODE AND BEHAVIOR  
AVERAGE RATING BY HISTORIC PLACES

TRAVEL MODE	VISIT HISTORIC PLACES		TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES OR OFTEN	
TRAVEL LONG DISTANCES	3.08	3.29**	3.23
TRAVEL BY AIR	2.74	2.73	2.73
TRAVEL BY BUS	1.36	1.46	1.43
TRAVEL BY TRAIN	1.26	1.38	1.35
TRAVEL BY MOTORCYCLE	1.31	1.27	1.28
TRAVEL BY CAR	3.62	3.72	3.70
GROUP TOURS	1.36	1.56	1.51

Rating Scale: never = 1 rarely = 2 sometimes = 3 often = 4  
STATISTICAL SIGNIFICANCE: \*\*p < .01, \*p < .05

The travel mode pattern of historians does not differ drastically from non-historians (Table VII.3), but they are slightly more apt to travel long distances.

TABLE VII.4  
VACATION PLANNING PATTERNS  
AVERAGE RESPONSE BY HISTORIC PLACES

	VISIT HISTORIC PLACES		TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES OR OFTEN	
USE TRAVEL AGENTS	2.16	2.36**	2.31
READ BOOKS OR ARTICLES	2.76	3.23**	3.11
SEEK FRIENDS ADVICE	3.08	3.28*	3.23
DESTINATION DECISION MONTHS IN ADVANCE	3.17	3.42	3.35
NUMBER OF OUT OF STATE VACATIONS	4.09	3.99	4.01
HOW MANY IN WINTER	1.61	1.36	1.42
HOW MANY IN SUMMER	2.62	2.54	2.56
DAYS AWAY ON LAST VACATION	14.55	14.87	14.79

Rating Scale for Travel Agents, Books, Friends:

never = 1   rarely = 2   sometimes = 3   often = 4

STATISTICAL SIGNIFICANCE: \*\*p < .01, \*p < .05

Historians are much more likely to read travel books or articles (Table VII.4). They are slightly more apt to use travel agents and friends' advice.



TABLE VII.5  
PERCEPTIONS OF MONTANA  
AVERAGE RATING BY HISTORIC PLACES

RATING OF MONTANA AS A PLACE	VISIT HISTORIC PLACES		TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES OR OFTEN	
SCENIC PLACE TO VISIT	3.31	3.39	3.37
GOOD DOLLAR VALUE	2.85	2.97	2.94
FRIENDLY PEOPLE	3.33	3.30	3.31
HISTORICAL SITES	2.84	3.07**	3.02
ENJOY OUTDOOR REC.	3.50	3.57	3.55
VARIETY OF VAC. ACTIVITIES	3.01	3.08	3.07
GOOD RESTAURANTS	2.79	2.72	2.74
FAMILY VACATION	3.18	3.34	3.30
HOTEL AND MOTELS	2.90	2.95	2.94
CLIMATE	2.69	2.79*	2.77
REST RELAX	3.25	3.33	3.31
EASY TO GET TO	2.67	2.52*	2.55
OVERALL VACATION PLACE	2.93	3.11	3.07

Rating Scale: poor = 1 fair = 2 good = 3 excellent = 4  
(don't know excluded)

STATISTICAL SIGNIFICANCE: \*\*p < .01, \*p < .05

Historians rated Montana (Table VII.5) with a pattern similar to average. Importantly, however, they did rate Montana above average as a place to visit historic places. They rated the climate slightly higher, and the ease of getting to Montana slightly lower than non-historians. They rated Montana higher as an "overall vacation place."

TABLE VII.6  
MONTANA VACATION POTENTIAL

	VISIT HISTORIC PLACES		TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES OR OFTEN	
ESTIMATED DRIVING DAYS TO MONTANA	2.10	2.16	2.14
ESTIMATED DAYS ON MONTANA VACATION	9.44	10.01	9.86
CHANCE OF VISITING YELLOWSTONE PARK	2.24	2.37**	2.34
CHANCE OF VISITING GLACIER PARK	2.09	2.25**	2.21
CHANCE OF VISITING MONTANA	2.34	2.47**	2.44

Rating Scale for Chance: very low = 1 low = 2 high = 3 very high = 4  
(don't know excluded)

STATISTICAL SIGNIFICANCE:: \*\*p < .01, \*p < .05

Historians estimated the chance of visiting Yellowstone Park, Glacier Park and Montana higher than non-historians (Table VII.6).

#### Demographics

In general, historians demographic characteristics are not substantially different than that of the general population. There is a tendency for older people to visit historical places more often when vacationing, but the difference is slight - about 30% of those under 30 report they do so "often," while about 38% of those over 45 do so (Table VII.7). Women reported often visiting historical places 37% of the time, while 29% of men were active historians. The education level (Table VII.8) did affect the

tendency to visit historical places, but the pattern is complex. Those who have attended graduate school and those with less than high school education were above average (about 42% often), while those with high school education (28% often) or technical school training (21% often) were below average (34% often).

The remaining demographic characteristics - marriage, number of children, urban/rural, occupation, and income - appear unrelated to the tendency to visit historical places.

TABLE VII.7  
AGE OF HISTORIANS

	AGE OF RESPONDENT					TOTAL SAMPLE
	UNDER 20	20 TO 29	30 TO 44	45 TO 59	60 AND OVER	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT
VISIT HISTORIC PLACES						
NEVER OR RARELY	30.2	35.1	21.0	21.6	20.9	25.3
SOMETIMES	38.1	37.0	44.0	40.7	40.5	40.7
OFTEN	31.7	27.9	35.0	37.7	38.6	34.0

STATISTICAL SIGNIFICANCE:  $P = .000$

TABLE VII.8  
EDUCATION OF HISTORIANS

	EDUCATION						TOTAL SAMPLE
	LESS THAN HS	HIGH SCHOOL	SOME COLLEGE	COLLEGE GRAD	GRADUATE SCHOOL	TECHNICAL SCHOOL	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	
VISIT HISTORIC PLACES							
NEVER OR RARELY	26.2	30.1	26.2	18.2	20.0	41.7	25.3
SOMETIMES	33.3	41.6	39.4	45.4	35.6	37.5	40.7
OFTEN	40.5	28.4	34.5	36.4	44.4	20.8	34.0

STATISTICAL SIGNIFICANCE:  $P=.004$

#### Summary

Predictably Historians not only enjoy visiting historic places but also museums and simply sightseeing. They have somewhat cosmopolitan tastes - enjoy big cities and fine restaurants - but are less likely to play golf or visit night clubs. Historians are active information seekers and use travel agents, books, articles, and friends as information sources. The perception of Montana as a place to visit historic sites was above average, but felt Montana was hard to get to. Non-historians rated their chance of visiting Montana below average. The demographic characteristics did not vary substantially from the population as a whole.

## CHAPTER VIII

### NATIONAL AND STATE PARK USAGE AS A VERTICAL SEGMENT

Parks are a major factor drawing tourists to Montana. The use of parks was shown in the previous discussion to be associated with outdoor activities and visiting historic places. Thus, the examination of the behavior and perceptions of the market categorized by frequency of visiting parks serves two purposes - first because it is potentially interesting in itself, and second because it captures in many ways a summary of "outdoor activities," some of which, like camping, are directly linked, others indirectly linked. Consequently, the more detailed three-fold classification will be presented.

Table VIII.1 illustrates the interrelationship discussed above. Except for snowmobiling and the beach, the more frequent the visits to national and state parks, the more often the respondents engaged in other outdoor activities.

TABLE VIII.1  
OUTDOOR RECREATION ACTIVITIES  
AVERAGE RATING BY PARKS

ACTIVITY	NAT. OR STATE PARKS			TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES	OFTEN	
SPEND TIME AT BEACH	2.61	2.74	2.74	2.71
GO CAMPING	1.98	2.43	2.94**	2.54
GO SKIING	1.81	1.97	2.13**	2.00
SNOWMOBILING	1.41	1.46	1.48	1.45
GO FISHING	2.40	2.51	2.87**	2.64
GO HUNTING	1.67	1.75	1.98**	1.83
HIKE, CLIMB OR PACK	1.62	2.01	2.48**	2.12
GO BOATING, CANOE OR RAFT	2.17	2.35	2.64**	2.43

Rating Scale: never = 1 rarely = 2 sometimes = 3 often = 4  
STATISTICAL SIGNIFICANCE: \*\*p < .01, \*p < .05

Table VIII.1 illustrates the interrelationship discussed above. Except for snowmobiling and the beach, the more frequent the visits to national and state parks, the more often the respondents engaged in other activities.

TABLE VIII.2  
VACATION OR PLEASURE TRIP ACTIVITIES  
AVERAGE RESPONSE BY PARKS

ACTIVITY	NAT. OR STATE PARKS			TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES	OFTEN	
VISIT MUSEUMS	2.45	2.74	2.99*	2.78
PLAY GOLF	2.01	1.80	1.80*	1.85
TRAVEL TO SIGHTSEE	3.14	3.25	3.52*	3.34
VISIT A RESORT	2.41	2.50	2.47**	2.47
SEE BIG CITIES	2.37	2.47	2.57*	2.49
VISIT HISTORIC PLACES	2.65	2.90	3.31**	3.02
FINE RESTAURANTS	2.81	2.82	2.87	2.84
NIGHT CLUBS	2.28	2.19	2.11*	2.18

Rating Scale: never = 1 rarely = 2 sometimes = 3 often = 4  
 STATISTICAL SIGNIFICANCE: \*\*p < .01, \*p < .05

In addition to the outdoor activities, visiting parks is positively related to the other vacation activities. The exceptions to this rule were "play golf" which is inversely related, and "going out of your way to dine at fine restaurants," which is not related.

TABLE VIII.3  
TRAVEL MODE AND BEHAVIOR  
AVERAGE RATING BY PARKS

TRAVEL MODE	NAT. OR STATE PARKS			TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES	OFTEN	
TRAVEL LONG DISTANCES	3.02	3.18	3.40**	3.23
TRAVEL BY AIR	2.86	2.71	2.67	2.73
TRAVEL BY BUS	1.35	1.46	1.45	1.43
TRAVEL BY TRAIN	1.27	1.36	1.37	1.35
TRAVEL BY MOTORCYCLE	1.19	1.24	1.36	1.28
TRAVEL BY CAR	3.48	3.69	3.81*	3.70
GROUP TOURS	1.51	1.51	1.50	1.51

Rating Scale: never = 1 rarely = 2 sometimes = 3 often = 4  
STATISTICAL SIGNIFICANCE: \*\*p < .01, \*p < .05

People who use the parks more often, travel "long distances" more often when vacationing and are more apt to do it by car. The remaining travel mode characteristics are not related to park usage.



TABLE VIII.4  
VACATION PLANNING PATTERNS  
AVERAGE RESPONSE BY PARKS

	NAT. OR STATE PARKS			TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES	OFTEN	
USE TRAVEL AGENTS	2.38	2.38	2.20	2.31
READ BOOKS OR ARTICLES	2.76	3.05	3.35*	3.11
SEEK FRIENDS ADVICE	2.98	3.21	3.38*	3.23
DESTINATION DECISION MONTHS IN ADVANCE	3.28	3.21	3.52*	3.35
NUMBER OF OUT OF STATE VACATIONS	4.37	3.86	3.96	4.01
HOW MANY IN WINTER	1.50	1.37	1.43	1.42
HOW MANY IN SUMMER	2.88	2.34	2.58	2.56
DAYS AWAY ON LAST VACATION	14.77	15.37	14.29	14.79

Rating Scale for Travel Agents, Books, Friends:

never = 1   rarely = 2   sometimes = 3   often = 4

STATISTICAL SIGNIFICANCE: \*\*p < .01, \*p < .05

The vacation planning style (Table VIII.4) is related to the use of parks - heavy users are more likely to read and discuss their plans with friends. They also make their decision where to go further in advance.

TABLE VIII.5  
PERCEPTIONS OF MONTANA  
AVERAGE RATING BY PARKS

RATING OF MONTANA AS A PLACE	NAT. OR STATE PARKS			TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES	OFTEN	
SCENIC PLACE TO VISIT	3.30	3.34	3.43	3.37
GOOD DOLLAR VALUE	2.84	2.96	2.96	2.94
FRIENDLY PEOPLE	3.28	3.25	3.36	3.31
HISTORICAL SITES	2.94	2.94	3.11*	3.02
ENJOY OUTDOOR REC.	3.53	3.49	3.60	3.55
VARIETY OF VAC. ACTIVITIES	3.03	3.02	3.11	3.07
GOOD RESTAURANTS	2.74	2.71	2.76	2.74
FAMILY VACATION	3.16	3.27	3.39	3.30
HOTEL AND MOTELS	2.96	2.91	2.95	2.94
CLIMATE	2.72	2.67	2.87*	2.77
REST RELAX	3.26	3.25	3.39**	3.31
EASY TO GET TO	2.57	2.44	2.64*	2.55
OVERALL VACATION PLACE	3.03	3.02	3.15	3.07

Rating Scale: poor = 1 fair = 2 good = 3 excellent = 4  
(don't know excluded)

STATISTICAL SIGNIFICANCE: \*\*p < .01, \*p < .05

In general, the higher the use of parks, the higher the rating of Montana, but the differences are quite small. Those that often visit national or state parks gave Montana 3.3 as a place to visit parks.

TABLE VIII.6  
MONTANA VACATION POTENTIAL

	NAT. OR STATE PARKS			TOTAL SAMPLE
	NEVER OR RARELY	SOMETIMES	OFTEN	
ESTIMATED DRIVING DAYS TO MONTANA	2.15	2.22	2.07	2.14
ESTIMATED DAYS ON MONTANA VACATION	9.28	9.83	10.19	9.86
CHANCE OF VISITING YELLOWSTONE PARK	2.05	2.24	2.58*	2.34
CHANCE OF VISITING GLACIER PARK	1.90	2.18	2.40**	2.21
CHANCE OF VISITING MONTANA	2.08	2.38	2.68**	2.44

Rating Scale for Chance: very low = 1 low = 2 high = 3 very high = 4  
(don't know excluded)

STATISTICAL SIGNIFICANCE: \*\*p < .01, \*p < .05

The use of parks increases the estimation of the chance of visiting Montana.

#### Demographics

As in the case of Historians, the demographics of those who actively visit state or national parks are not substantially different than the travel population as a whole. Families with more children (Table VIII.7) tend to be more active parker users; those over 60 (Table VIII.8) less active users, and there is a slight tendency for the upper middle income ranges (\$30,000 to \$50,000) to report visiting parks "often" (Table VIII.9),

but in no case is the relationship very strong. None of the remaining demographic characteristics examined, marriage, sex, urban/rural, education, and occupation were significantly related to park usage.

TABLE VIII.7  
CHILDREN OF PARK VISITORS

	NUMBER OF CHILDREN				TOTAL SAMPLE
	NO CHILDREN	ONE CHILD	TWO CHILDREN	THREE OR MORE CHILDREN	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT
NAT. OR STATE PARKS					
NEVER OR RARELY	24.2	23.0	18.3	16.4	21.9
SOMETIMES	39.6	36.6	31.7	35.6	37.0
OFTEN	36.1	40.4	50.0	47.9	41.1

STATISTICAL SIGNIFICANCE:  $P = .014$

TABLE VIII.8  
AGE OF PARK VISITORS

	AGE OF RESPONDENT					TOTAL SAMPLE
	UNDER 20	20 TO 29	30 TO 44	45 TO 59	60 AND OVER	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT
NAT. OR STATE PARKS						
NEVER OR RARELY	14.3	15.4	21.0	28.6	29.7	21.9
SOMETIMES	41.3	39.7	35.0	34.2	39.2	37.0
OFTEN	44.4	44.9	44.0	37.2	31.0	41.1

STATISTICAL SIGNIFICANCE:  $P=.003$

TABLE III.9  
INCOME OF PARK VISITORS

	INCOME RANGE						TOTAL SAMPLE
	REFUSED	LESS THAN 20K	20 TO 30K	30 TO 40K	40 TO 50K	OVER 50K	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT
NAT. OR STATE PARKS							
NEVER OR RARELY	33.7	20.3	21.6	16.2	18.3	27.9	21.9
SOMETIMES	33.7	44.6	35.8	37.6	34.5	33.5	37.0
OFTEN	32.6	35.1	42.6	46.2	47.2	38.5	41.1

STATISTICAL SIGNIFICANCE:  $P=.002$

### Summary

Frequent park visitors are active in many outdoor activities and vacation activities. They travel long distances and are more likely to do it by car. They plan their travel decisions further in advance and are more likely than average to read books, articles, and seek friends advice. Those who often visit parks have a better perception of Montana, but the increase is small. They give a high rating (3.3) to Montana as a place to visit parks and rated their chance of visiting Montana above average.

Visiting parks is more likely among large families, but in general is not related to other demographic characteristics.

## CHAPTER IX

### ACTIVITIES AND INTERESTS AS VERTICAL AND MARKET SEGMENTS

#### Introduction

The past five chapters examined the differences between those who participate in specific activities and those who don't. This chapter examines activities starting from the question, "Can activities be used as the basis of segmenting the market by classes of activities that together give an indication of the major travel interests of tourists?" The objective for segmentation is to find a grouping scheme which will classify each family into one of several segments. The classification rule should produce groups whose activities and interests are similar within the group, yet different between the groups. Once formed, these segments will be compared from the standpoint of attitudes regarding Montana, familiarity with Montana, chance of visiting Montana, and demographic characteristics.

The method used to form the segments was factor analysis of the activity profile. Factor analysis addresses the question of whether a large set of variables can be explained with a small number of linear combinations of variables. For example, one might expect that an interest in seeing big cities is strongly related to interests in seeking fine restaurants, and that respondents who enjoy these activities are "different" than those who enjoy Aiking and camping.

The first question is how many segments - factors - are needed? The method used to address this question was "Principal Factor Analysis." The method decomposes the correlation matrix into many factors and ranks each by its ability to explain the variation between activities. Nearly all of the variation was accounted for by four factors. The next question addressed is

what these factors represent - in particular, do the activities which comprise a factor form natural and therefore useful classes of activities? The method used to address this question was "Maximum Likelihood Factor Analysis," with the four factors and a "procrustes" rotation. While the technical details of the procedure are complex, the goal is very similar to that of segmentation - find a subset of variables which behave similarly within each group yet are different from those of the other groups. The result of this analysis is shown in Table IX.1

TABLE IX.1  
ACTIVITY FACTOR LOADINGS  
(STANDARDIZED SCORES, ROTATED)

	FACTOR 1	FACTOR 2	FACTOR 3	FACTOR 4
NIGHT CLUBS	0.25	-0.05	0.02	0.01
VISIT A RESORT	0.24	0.01	0.01	0.01
FINE RESTAURANTS	0.23	0.05	-0.03	-0.01
SEE BIG CITIES	0.18	0.10	-0.06	-0.00
PLAY GOLF	0.13	-0.03	0.01	-0.01
SPEND TIME AT BEACH	0.11	-0.03	-0.01	0.11
TRAVEL LONG DISTANCES	0.07	0.06	-0.01	0.06
VISIT HISTORIC PLACES	-0.04	0.45	0.01	0.00
VISIT MUSEUMS	-0.00	0.27	-0.04	0.00
TRAVEL TO SIGHTSEE	0.02	0.14	-0.01	-0.00
GO HUNTING	-0.01	-0.00	0.40	-0.02
GO FISHING	-0.04	-0.01	0.34	0.08
SNOWMOBILING	0.07	-0.02	0.11	0.01
HIKE, CLIMB OR PACK	-0.02	0.08	-0.03	0.27
GO CAMPING	-0.09	-0.00	0.19	0.31
GO SKIING	0.12	-0.06	-0.01	0.19
GO BOATING, CANOE OR RAFT	0.10	-0.06	0.11	0.20
NAT. OR STATE PARKS	-0.06	0.15	0.04	0.18

Factor 1 loads heavily on night clubs, resorts, and restaurants; activities which imply a "cosmopolitan" interest set. While it has moderate loading on several other activities, these are shared by other factors. The second factor loads on seeing historic places, museums, sights and parks - traveling to "see the sights." Factor 3 loads on hunting and fishing. Factor 4 loads on vigorous activities such as hiking, climbing, skiing, and camping - the "active sports."



Since these factors have both "intuitive" clusters and clearly correspond to activities of particular interest to the Montana travel industry, they were used to classify respondents into vertical segments. The method of classification was to select the top activities for each factor, average the response across each of these top activities, and classify each respondent by the highest interest score. The result of this is shown in Table IX.2, where the activities which were used to define the categories are indicated by "#." The discrimination between groups is very good. Visiting night clubs, for instance, rates 3.26, or slightly above "sometimes" for the cosmopolitans, but near 2 (rarely) for the other groups. This result implies that the factor analysis procedure has had the desired effect of finding natural and meaningful groups since people who are cosmopolitan are rarely interested in the other activities, and non-cosmopolitans have little interest in "cosmopolitan activities." The exceptions to this general rule are few, but of some interest. Some activities are shared by all groups - spending time at the beach, playing golf, visiting national or state parks are all only weakly related to major interest. While sightseeing is most popular among the "see the region" group, it is popular among all groups. Seeking fine restaurants is extremely likely for the cosmopolitan, but popular among all travelers. Hunters and fishermen share camping as a popular activity with those interested in the active sports.

Good target markets should also be "substantial;" that is they should be of sufficient size and match the market "offering" of Montana. The match between interests and Montana's offering is undoubtedly worst for the cosmopolitan segment - not that Montana has nothing to offer, but Montana is certainly not a cosmopolitan area. The group, however, is relatively small - only 15.1% of the respondents were classified as cosmopolitan. Montana has much to offer those

TABLE IX.2  
ACTIVITIES OF INTEREST  
SEGMENTS, AVERAGE RATING

ACTIVITY	MAJOR TRAVEL INTERESTS				TOTAL SAMPLE
	COSMO- POLITAN	SEE THE REGION	HUNT OR FISH	ACTIVE SPORTS	
NIGHT CLUBS	# 3.26	1.88	2.15	2.12	2.18
VISIT A RESORT	# 3.15	2.32	2.39	2.39	2.47
FINE RESTAURANTS	# 3.51	2.76	2.67	2.66	2.84
SEE BIG CITIES	# 3.11	2.51	2.16	2.29	2.49
PLAY GOLF	2.24	1.69	1.88	1.96	1.85
SPEND TIME AT BEACH	2.94	2.60	2.65	3.03	2.71
VISIT HISTORIC PLACES	2.52	# 3.36	2.85	2.57	3.02
VISIT MUSEUMS	2.35	# 3.20	2.48	2.21	2.78
TRAVEL TO SIGHTSEE	2.97	# 3.63	3.14	2.99	3.34
GO HUNTING	1.34	1.35	# 3.44	1.45	1.83
GO FISHING	2.13	2.30	# 3.73	2.63	2.63
SNOWMOBILING	1.52	1.30	1.71	1.51	1.45
HIKE, CLIMB OR PACK	1.72	2.07	1.99	# 3.01	2.12
GO CAMPING	2.06	2.24	3.06	# 3.35	2.54
GO SKIING	2.17	1.68	1.89	# 3.23	2.00
GO BOATING, CANOE OR RAFT	2.32	2.16	2.65	# 3.23	2.43
NAT. OR STATE PARKS	2.74	3.15	3.13	3.34	3.10
PERCENT IN SEGMENT	15.1%	50%	22.7%	12.7%	100%

Rating scale: never = 1 rarely = 2 sometimes = 3 often = 4  
ALL ACTIVITIES HAVE STATISTICAL SIGNIFICANCE OF  $p < .001$

interested in travel to "see the region." Montana certainly has many areas of highly attractive sights and a colorful and interesting history which has been preserved in both "places" and museums to visit. This interest area, on the other hand, is very broad and well served by many regions of the country. The size of the group makes it interesting - 50% of respondents are in this classification - but the competition is keen.

The next group, those with interests focused on hunting and fishing, has several attractive features. A surprisingly large percentage, 22.7%, of respondents were so classified. The interests of this group are highly focused - the remaining groups, for example, were close to never on hunting. The only other activities that averaged above sometimes, (i.e., 3.0) for hunters and fishermen were sightseeing and visiting national and state parks, both activities that Montana offers in abundance.

The segment interested in "active sports" is small, only 13.7%, but intriguing because their interests are very closely matched to Montana's strengths. The wilderness areas offer an abundance of opportunities for hiking and backpacking; the streams and lakes of Montana offer excellent canoeing and boating; the ski areas are excellent.

Another criteria of good segments is that they should be "responsive" to marketing effort. While future behavior cannot be directly estimated from this study, one way to assess this is to look at the past behavior and intentions of the groups. Tables IX.3 and IX.4 illustrate several important differences. The cosmopolitans have traveled less in the Rocky Mountains and less in Montana.

TABLE IX.3  
TRAVEL PATTERNS, FAMILIARITY  
AND INTENTIONS OF  
INTEREST SEGMENTS

	ACTIVITY				TOTAL SAMPLE
	COSMO- POLITAN	SEE THE REGION	HUNT OR FISH	ACTIVE SPORTS	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT
ROCKY MOUNTAIN TRAVEL *	100.0	100.0	100.0	100.0	100.0
NO	62.1	58.0	50.2	52.9	56.2
YES	37.9	42.0	49.8	47.1	43.8
EVER BEEN IN MONTANA **	100.0	100.0	100.0	100.0	100.0
NO	51.0	41.1	37.7	34.1	40.8
YES	49.0	58.9	62.3	65.9	59.2
FAMILIAR W/MT	100.0	100.0	100.0	100.0	100.0
FAMILIAR	11.0	13.5	16.0	18.8	14.4
SOMEWHAT	31.0	33.6	31.2	34.1	32.8
NOT AT ALL	57.9	52.8	52.8	47.1	52.8
CHANCE OF VISITING MONTANA **	100.0	100.0	100.0	100.0	100.0
VERY LOW	22.1	23.3	18.6	14.5	21.0
LOW	31.7	34.9	29.4	26.1	32.2
HIGH	28.3	26.2	31.6	37.7	29.1
VERY HIGH	15.9	13.7	19.0	21.0	16.1
DONT KNOW	2.1	2.0	1.3	0.7	1.7

STATISTICAL SIGNIFICANCE: \* P < .05, \*\* P < .01

TABLE IX.4  
MONTANA VACATION POTENTIAL

	MAJOR TRAVEL INTERESTS				TOTAL SAMPLE
	COSMO- POLITAN	SEE THE REGION	HUNT OR FISH	ACTIVE SPORTS	
ESTIMATED DRIVING DAYS TO MONTANA	2.24	2.27	2.00	1.91	***2.16
ESTIMATED DAYS ON MONTANA VACATION	9.37	10.29	9.63	9.54	9.91
CHANCE OF VISITING YELLOWSTONE PARK	2.26	2.26	2.47	2.48	2.34
CHANCE OF VISITING GLACIER PARK	2.11	2.16	2.25	2.47	**2.21
CHANCE OF VISITING MONTANA	2.41	2.34	2.55	2.67	***2.44

Rating Scale for Chance: very low = 1 low = 2 high = 3 very high = 4  
(don't know excluded)

STATISTICAL SIGNIFICANCE: \*\*  $p < .01$ , \*\*\*  $p < .00$

The familiarity with Montana varies only slightly between groups, so the differences could be due to sampling error, but cosmopolitans rate their familiarity with Montana slightly below average. Significantly they rate their chance of visiting Montana and Yellowstone about average, but Glacier below average. The outdoor groups of hunting, fishing, and active sports, on the other hand, have traveled in both the Rocky Mountain states and Montana more than average, are slightly above average in terms of familiarity, and rate their chances of visiting Montana above average. Interest in active sports leads to an especially high rating of the chance of visiting Glacier (2.47) and Montana (2.67), with 60% giving high or very high chance of visiting Montana compared to the average of 45%. The active sport segment also perceives the time needed to travel to Montana to be less (1.91 days) than average (2.16 days). The sightseeing segment has about average travel experience and familiarity with

Montana, but rates their chance of visiting Montana at 2.34, below average. Given the large size of this segment, however, even though only 14% rated their chance at "very high;" this represents a large number of travelers.

#### Summary of Segmentation Features

In general, the four groups meet the criteria of good segments. They have similar interest within the groups, and major differences of interests between the groups. Each group is of sufficient size and match to Montana's offering to be an interesting segment. The past travel behavior of the groups with regard to both Rocky Mountain and Montana travel varies in ways one would anticipate. Their intentions to travel to Montana also vary - with the emphasis going to the outdoor activities.

TABLE IX.5  
TRAVEL MODE AND BEHAVIOR  
AVERAGE RATING BY SEGMENT

TRAVEL MODE	MAJOR TRAVEL INTERESTS				TOTAL SAMPLE
	COSMO- POLITAN	SEE THE REGION	HUNT OR FISH	ACTIVE SPORTS	
TRAVEL LONG DISTANCES	3.31	3.23	3.12	3.32	*3.23
TRAVEL BY AIR	3.19	2.73	2.35	2.74	***2.72
TRAVEL BY BUS	1.40	1.49	1.34	1.39	**1.43
TRAVEL BY TRAIN	1.37	1.35	1.26	1.43	1.35
TRAVEL BY MOTORCYCLE	1.21	1.21	1.37	1.41	***1.27
TRAVEL BY CAR	3.56	3.71	3.78	3.70	***3.70
GROUP TOURS	1.58	1.58	1.44	1.27	***.51

Rating Scale: never = 1 rarely = 2 sometimes = 3 often = 4  
STATISTICAL SIGNIFICANCE: \*\*p < .01, \*p < .05

The travel patterns (Table IX.5) vary somewhat by interest group. Cosmopolitans are the most likely of the groups to select air travel. All groups have high frequency of traveling by car, but cosmopolitans do so less often than others. Those interested in "seeing the region" have average travel patterns. Hunters and fishermen are the group least likely to travel by air and most likely to travel by car. While those interested in the active sports report low frequency of motorcycle use, they are the most likely of the groups to do so, and the least likely to travel with group tours.

TABLE IX.6  
VACATION PLANNING AND PATTERNS  
AVERAGE RATING BY SEGMENT

	MAJOR TRAVEL INTERESTS				TOTAL SAMPLE
	COSMO- POLITAN	SEE THE REGION	HUNT OR FISH	ACTIVE SPORTS	
USE TRAVEL AGENTS	2.67	2.38	1.94	2.23	***2.31
READ BOOKS OR ARTICLES	2.98	3.24	2.93	3.11	***3.12
SEEK FRIENDS ADVICE	3.22	3.21	3.26	3.21	3.22
DESTINATION DECISION MONTHS IN ADVANCE	3.37	3.63	2.99	2.88	*3.35
NUMBER OF OUT OF STATE VACATIONS	4.73	3.58	3.97	4.81	4.00
HOW MANY IN WINTER	1.89	1.15	1.51	1.67	*1.40
HOW MANY IN SUMMER	2.73	2.27	2.75	3.11	*2.55
DAYS AWAY ON LAST VACATION	11.57	15.24	15.90	14.18	14.69

Rating Scale for Travel Agents, Books, Friends:

never = 1 rarely = 2 sometimes = 3 often = 4

STATISTICAL SIGNIFICANCE: \*  $p < .05$ , \*\*  $p < .01$ , \*\*\*  $p < .001$

The information seeking characteristics vary considerably between the interest groups, but all groups rely heavily on friends' advice (Table IX.6). Cosmopolitan interests lead to the heavy use of travel agents, while this information source is rarely used by hunters and fisherman. Those interested in "seeing the region" are most likely to read books and articles while, somewhat surprisingly given the number of outdoor magazines, the hunters and fishermen average less than "sometimes." Active sports interests lead to a more spontaneous decision (yet still planned 2.9 months in advance), while interest in sightseeing leads to the largest planning horizon (3.6 months).

Both the cosmopolitan segment and the active sport segment take an above average number of out-of-state vacations. The active sport segment is especially active in the summer. While the cosmopolitans are more likely to travel in the summer than winter, they travel more in the winter than the remaining segments.

The general perception of Montana varies little between segments (Table IX.7). The ratings of Montana as a place to enjoy the activity which is of major interest to the segment (Table IX.8), however shows major differences between segments. The cosmopolitan segment gives only a "fair" rating to the activities which are of primary interest. It is interesting to note that while people who actively seek out fine restaurants on the average feel that Montana's restaurants are between "fair" and "good" (2.43), cosmopolitans rate them only "fair" (2.00), and sightseers rate them closer to "good" (2.65). The "see the region" segment rates Montana near "good" on their prime activities, (3.19 on sightseeing). Those in the "see the region" segment who also engage in the more vigorous activities of fishing, hiking, skiing, etc., give high ratings to Montana as a place to enjoy these activities. The hunters and fishermen give Montana high ratings as a place to enjoy hunting and fishing, and those who



combine this with the other vigorous activities give high ratings on these too. The active sport segment rates Montana "good" or "better" as a place to enjoy those activities they are most interested in, but somewhat surprisingly not as high as the hunters and fishermen rate the same activities.

TABLE IX.7

	MAJOR TRAVEL INTERESTS				TOTAL SAMPLE
	COSMO- POLITAN	SEE THE REGION	HUNT OR FISH	ACTIVE SPORTS	
SCENIC PLACE TO VISIT	3.39	3.40	3.34	3.31	3.37
GOOD DOLLAR VALUE	3.00	3.00	2.82	2.85	2.94
FRIENDLY PEOPLE	3.46	3.28	3.32	3.21	3.31
HISTORICAL SITES	2.90	3.05	3.05	2.95	3.02
ENJOY OUTDOOR REC.	3.56	3.53	3.57	3.58	3.55
VARIETY OF VAC. ACTIVITIES	3.01	3.05	3.12	3.13	3.07
GOOD RESTAURANTS	2.76	2.74	2.76	2.71	2.74
FAMILY VACATION	3.29	3.29	3.32	3.30	3.30
HOTEL AND MOTELS	2.93	2.97	2.95	2.78	2.93
CLIMATE	2.71	2.78	2.77	2.83	2.77
REST RELAX	3.39	3.26	3.35	3.35	3.31
EASY TO GET TO	2.47	2.50	2.71	2.60	2.56
OVERALL VACATION PLACE	2.96	3.06	3.17	3.04	3.07

Rating Scale: poor = 1 fair = 2 good = 3 excellent = 4  
(don't know excluded)

STATISTICAL SIGNIFICANCE: \*\*P < .01, \*P < .05

TABLE IX.8  
RATINGS OF MONTANA AS A PLACE TO ENJOY...,  
AVERAGE BY ONLY THOSE WHO "OFTEN" DO THE ACTIVITY

MONTANA ACTIVITY RATING	MAJOR TRAVEL INTERESTS				TOTAL SAMPLE
	COSMO- POLITAN	SEE THE REGION	HUNT OR FISH	ACTIVE SPORTS	
NIGHT CLUB	# 2.25				2.43
RESORT	# 2.78	2.83			2.84
RESTAURANT	# 2.00	2.65			2.43
BIG CITY	# 1.74	1.76			1.77
MT. BEACH RATING	1.58	1.79	1.58	2.15	1.76
MT. HISTORIC RATING		# 2.93			2.98
MT. MUSEUM RATING		# 2.70			2.66
MT. SIGHT SEEING RATING	3.09	# 3.19	3.30	3.09	3.19
MT. HUNTING RATING			# 3.68		3.66
MT. FISHING RATING		3.46	# 3.45	3.38	3.43
HIKING,		3.53	3.77	# 3.62	3.60
MT. CAMPING RATING		3.43	3.60	# 3.51	3.50
MT. SKIING RATING	3.42	3.26		# 3.32	3.34
MT. BOATING RATING		3.13	3.15	# 3.03	3.08
MT. PARK RATING		3.26	3.48	3.06	3.26

Rating Scale: 1 = poor 2 = fair 3 = good 4 = excellent

Note 1) Sample size of all reported cells is 20 or over

Note 2) # signifies items used to define the category.

## Demographics

Cosmopolitans tend to be married (56%), but less so than the general population (64%, Table IX.9). They tend to be younger people (Table IX.11 shows 38% are 20-29 years) and likely to be found in urban areas (75% live in urban areas, Table IX.13). They tend to be college graduates (Table IX.14) with high income (e.g., 30% earn over \$50,000, Table IX.15) with white collar occupations (Table IX.16).

The segment interested in the active sports also tend to be single and younger (39% are under 30, Table IX.11). They differ from cosmopolitans, however, by being similar to the general population in terms of occupation, education, and income.

The segment of hunters and fishermen have a nearly opposite demographic profile than cosmopolitans. They are more likely than the general traveler to be married (Table IX.9), have children (Table IX.10) and live in a rural area (Table IX.13). They are less likely to have completed college (20% versus 32%, Table IX.14), have middle incomes (61% are in the range \$20-40,000 versus 46% for the average traveler, Table IX.16) and somewhat more likely to have blue collar occupations (Table IX.15). Contrary to many stereotypes, however, the traveling hunter and fishermen segment contains a surprisingly high number of people with at least some college (52%) and white collar occupations (56%).

Perhaps because they are such a large group, the segment of those interested in seeing the region has few distinct demographic characteristics. They do, however, tend to be slightly older than the general traveler (Table IX.11).

TABLE IX.9  
MARITAL CHARACTERISTICS OF ACTIVITY SEGMENTS

	ACTIVITY				TOTAL SAMPLE
	COSMO- POLITAN	SEE THE REGION	HUNT OR FISH	ACTIVE SPORTS	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT
MARITAL STATUS					
SINGLE	30.3	19.2	22.5	39.1	24.0
MARRIED	55.9	67.8	69.3	49.3	64.1
DIVORCED OR SEPARATED	13.8	13.0	8.2	11.6	11.9

P = .000

TABLE IX.10  
CHILD CHARACTERISTICS OF ACTIVITY SEGMENTS

	ACTIVITY				TOTAL SAMPLE
	COSMO- POLITAN	SEE THE REGION	HUNT OR FISH	ACTIVE SPORTS	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT
NUMBER OF CHILDREN					
NO CHILDREN	52.4	53.0	39.0	54.3	50.1
ONE CHILD	21.4	16.9	19.9	17.4	18.2
TWO CHILDREN	17.9	17.8	26.8	14.5	19.3
THREE OR MORE CHILDREN	8.3	12.3	14.3	13.8	12.4

P = .004

TABLE IX.11  
AGE CHARACTERISTICS OF ACTIVITY SEGMENTS

	ACTIVITY				TOTAL SAMPLE
	COSMO- POLITAN	SEE THE REGION	HUNT OR FISH	ACTIVE SPORTS	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT
AGE OF RESPONDENT					
UNDER 20	4.8	3.4	6.5	14.5	5.7
20 TO 29	37.9	17.4	31.2	36.2	25.6
30 TO 44	33.8	35.2	35.9	31.2	34.7
45 TO 59	14.5	24.4	17.7	13.8	20.3
60 AND OVER	9.0	19.6	8.7	4.3	13.8

P = .002

TABLE IX.12  
SEX CHARACTERISTICS OF ACTIVITY SEGMENTS

	ACTIVITY				TOTAL SAMPLE
	COSMO- POLITAN	SEE THE REGION	HUNT OR FISH	ACTIVE SPORTS	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT
SEX OF RESPONDENT					
MALE	39.8	28.8	44.2	45.7	35.7
FEMALE	60.2	71.2	55.8	54.3	64.3

P = .000

TABLE IX.13  
URBAN ORIENTATION OF ACTIVITY SEGMENTS

	ACTIVITY				TOTAL SAMPLE
	COSMO- POLITAN	SEE THE REGION	HUNT OR FISH	ACTIVE SPORTS	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT
URBAN OR RURAL					
RURAL	24.8	31.1	50.2	35.5	34.9
URBAN	75.2	68.9	49.8	64.5	65.1

P=.000

TABLE IX.14  
EDUCATION OF ACTIVITY SEGMENTS

	ACTIVITY				TOTAL SAMPLE
	COSMO- POLITAN	SEE THE REGION	HUNT OR FISH	ACTIVE SPORTS	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT
EDUCATION					
LESS THAN HS	5.5	8.5	5.6	6.5	7.2
HIGH SCHOOL	25.5	28.6	39.0	26.1	30.1
SOME COLLEGE	24.8	27.2	32.0	31.9	28.5
COLLEGE GRAD	28.3	24.6	17.3	27.5	23.9
GRADUATE SCHOOL	11.7	9.6	2.6	8.0	8.2
TECHNICAL SCHOOL	4.1	1.4	3.5	0.0	2.0

P = .000

TABLE IX.15  
OCCUPATION OF ACTIVITY SEGMENTS

OCCUPATION OF RESPONDENT	ACTIVITY				TOTAL SAMPLE
	COSMO- POLITAN	SEE THE REGION	HUNT OR FISH	ACTIVE SPORTS	
	PERCENT	PERCENT	PERCENT	PERCENT	
HIGH WHITE	23.4	18.7	12.1	18.1	17.8
MOD. WHITE	19.3	12.8	10.8	18.8	14.0
LOW WHITE	20.7	15.8	14.3	18.8	16.5
OTHER	21.4	24.2	30.3	24.6	25.2
HIGH BLUE	3.4	6.9	9.5	10.9	7.5
MOD. BLUE	4.1	3.9	9.5	4.3	5.2
LOW BLUE	2.1	2.5	4.8	0.7	2.7
RETIRED	5.5	15.1	8.7	3.6	11.0

P = .000

TABLE IX.16  
INCOME OF ACTIVITY SEGMENTS

INCOME RANGE	ACTIVITY				TOTAL SAMPLE
	COSMO- POLITAN	SEE THE REGION	HUNT OR FISH	ACTIVE SPORTS	
	PERCENT	PERCENT	PERCENT	PERCENT	
REFUSED	7.6	9.4	8.2	5.1	8.4
LESS THAN 20K	14.5	20.6	12.6	12.3	17.0
20 TO 30K	17.2	23.0	32.5	27.5	24.8
30 TO 40K	16.6	19.2	28.6	20.3	21.0
40 TO 50K	14.5	13.5	10.0	11.6	12.6
OVER 50K	29.7	14.2	8.2	23.2	16.2

P = .000



CHAPTER X  
SPECIAL ANALYSIS

Introduction

This chapter presents the results of some analysis that is useful in understanding the perceptions that survey respondents have about Montana. There are four major sections to this chapter. The first section compares the perceptions of respondents who were familiar with Montana to those of respondents who are less familiar with Montana as a vacation destination. By making these comparisons, it is possible to compare Montana's image to the actuality of the conditions in Montana. Key perceptions on the part of those who know little about the state can be identified.

The second section of the chapter compares perceptions of respondents who have been in Montana and those who have not. This comparison should also be useful in the design of promotional materials since it will show where the public holds a distorted view of Montana and its special attributes. To the extent that perceptions on the part of those who have visited Montana are congruent with perceptions on the part of those who have never been here, it would not be necessary to correct the public's image of Montana through promotion.

The third and fourth sections of this chapter describe the samples' responses to the open ended questions on the survey. Section three covers the free associations to the questions where respondents were asked to provide three words that describe Montana. The fourth and final section overviews the results of the questions on the best and worst aspects of a Montana vacation. Taken together, these responses provide a compelling picture of the state of knowledge about Montana and the problems and potential for promoting Montana as a vacation destination.

### Familiarity with Montana

Familiarity with Montana reveals the degree to which the respondents view themselves as being aware of the attributes of Montana. Obviously, the degree of familiarity is important, as is the degree to which familiar respondents view Montana differently than unfamiliar respondents. As a first step, it is necessary to examine the familiarity data to see what demographic differences there are between respondents who report different levels of familiarity with Montana. This is useful so that perceptual differences are not improperly attributed to differences in the responding population, rather than to differences in familiarity.

To examine the demographic patterns of familiar, somewhat familiar and unfamiliar respondents, crosstabulations between the key demographic variables and the familiarity responses were run. There were no statistically significant relationships for: marital status, number of children, age of respondent, sex of respondent, rural or urban, occupational status, or income. There were, however, significant differences for two of the demographic variables, education and region. The results of comparing educational levels for respondents who where different in their familiarity with Montana, reported in Table X.1, suggests a complex relationship between educational level and familiarity. Probably the best explanation of the observed pattern of results is that as educational level increases, the proportion of the sample that describes themselves as somewhat familiar with Montana increases. This probably results from increased education leading to more exposure to information about the world and a reluctance to admit total ignorance about anything.

Table IX.1  
CROSSTABULATION OF EDUCATION AND  
FAMILIARITY

P value ***	EDUCATION						TOTAL SAMPLE
	LESS THAN HS	HIGH SCHOOL	SOME COLLEGE	COLLEGE GRAD	GRADUATE SCHOOL	TECHNICAL SCHOOL	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	
FAMILIAR W/MT							
FAMILIAR	17.9	11.5	15.7	13.4	12.2	20.8	13.9
SOMEWHAT	20.2	28.1	32.9	39.4	41.1	29.2	32.6
NOT AT ALL	61.9	60.4	51.4	47.2	46.7	50.0	53.6

TABLE IX.2  
CROSSTABULATION OF REGION BY  
FAMILIARITY

P value ***	REGION								TOTAL SAMPLE
	MINN WIS		WYO		WASH ORE		CANADA		
	EASTERN		IDAHO		NEV	SO CAL	(ALBERTA		
	N.D. AND S.D.	MICH IND ILL	WESTERN N.D. AND S.D.	COLO UTAH	NORTHERN CAL	AZ NM WEST TEX	SASKAT- CHEWAN)		
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	
FAMILIAR W/MT									
FAMILIAR	11.3	5.1	24.8	11.4	13.7	14.1	17.7	13.9	
SOMEWHAT	35.0	22.0	41.4	36.4	35.7	24.2	34.4	32.6	
NOT AT ALL	53.7	72.9	33.8	52.1	50.6	61.7	47.9	53.6	

The second demographic variable familiarity is the region in which the respondent lives. The results here, presented in Table X.2, indicate that, not suprisingly, people who live closer to Montana are more familiar with the state than people who live farther away.

In both of these cases, the results of our demographic analysis support the view that there is no reason to consider the differences that appear when familiar respondents are contrasted with unfamiliar respondents as being attributable to differences in the demographic profiles of those with differing levels of familiarity. Thus, we can go ahead and compare the perceptions of the familiar and unfamiliar respondents without undue concern about the presence of contamination.

#### Outdoor Recreation and Vacation Activities

The first place where differences can be observed between those familiar with Montana and those less familiar is in the frequency with which a variety of vacation and recreational activities are reported. Table X.3 and Table X.4 compare the mean frequency with which the respondent and their families engaged in the various recreational activities, computed within a familiarity category. Of the 17 activities presented, there are significant differences for only five: hiking, climbing and backpacking; visiting museums; traveling to sightsee; visiting resorts; and, visiting national or state parks. In each of these categories of recreational activities, the major differences are between those who report familiarity or somewhat familiar and those who are not at all familiar. As familiarity increases, participation in all of these activities increases as well. Probably the most interesting aspect of these findings is what was not found. Specifically, there were not significant differences in familiarity with Montana across the vertical segments. To the extent that the

media plan of the State promotional effort has targeted these groups, it is somewhat surprising that they don't report greater familiarity than other groups who are less likely to have been exposed to the promotional efforts. Rather, the profile of the respondent who is most familiar with Montana points to a person who travels for the thrill of adventure and discovery. These folks like to visit resorts, parks, museums and sightsee in general. An appeal targeted at these adventures would stress the unique and different nature of Montana as a vacation destination.

TABLE X.3  
OUTDOOR RECREATION ACTIVITIES FOR  
FAMILIAR, SOMEWHAT FAMILIAR AND  
UNFAMILIAR RESPONDENTS

	FAMILIAR W/MT			TOTAL SAMPLE
	FAMILIAR	SOMEWHAT	NOT AT ALL	
SPEND TIME AT BEACH	2.72	2.76	2.69	2.71
GO CAMPING	2.60	2.65	2.46	2.54
GO SKIING	2.07	2.08	1.93	2.00
SNOWMOBILING	1.48	1.49	1.42	1.45
GO FISHING	2.65	2.61	2.64	2.64
GO HUNTING	2.02	1.85	1.77	1.83
HIKE, CLIMB OR PACK	2.32	2.28	1.96	*** 2.12
GO BOATING, CANOE OR RAFT	2.49	2.49	2.38	2.43

Rating Scale: poor = 1 fair = 2 good = 3 excellent = 4  
(don't know excluded)

STATISTICAL SIGNIFICANCE: \*\*\*p <.001

TABLE X.4  
VACATION ACTIVITIES FOR FAMILIAR  
MODERATELY FAMILIAR AND  
UNFAMILIAR RESPONDENTS

	FAMILIAR W/MT			TOTAL SAMPLE
	FAMILIAR	SOMEWHAT	NOT AT ALL	
VISIT MUSEUMS	2.82	2.93	2.68	*** 2.78
PLAY GOLF	1.79	1.90	1.83	1.85
TRAVEL TO SIGHTSEE	3.41	3.41	3.27	** 3.34
VISIT A RESORT	2.55	2.57	2.39	** 2.47
NAT. OR STATE PARKS	3.25	3.28	2.98	*** 3.11
SEE BIG CITIES	2.52	2.54	2.45	2.49
VISIT HISTORIC PLACES	3.07	3.05	2.98	3.02
FINE RESTAURANTS	2.86	2.90	2.79	2.84
NIGHT CLUBS	2.15	2.12	2.22	2.18

Rating Scale: poor = 1 fair = 2 good = 3 excellent = 4  
(don't know excluded)

STATISTICAL SIGNIFICANCE: \*\*\*p < .001, \*\*p < .01, \*p < .05

This pattern of adventuresome travel is supported by the travel patterns of those familiar with Montana. As can be seen in Table X.5, travelers who report higher familiarity with Montana are also likely to report traveling long distances and traveling by car. Interestingly enough, air travel is more used by those who report only moderate familiarity with Montana.

TABLE X.5  
TRAVEL MODE AND BEHAVIOR OF FAMILIAR AND  
UNFAMILIAR RESPONDENTS

	FAMILIAR W/MT			TOTAL SAMPLE
	FAMILIAR	SOMEWHAT	NOT AT ALL	
TRAVEL LONG DISTANCES	3.39	3.26	3.18	** 3.23
TRAVEL BY AIR	2.65	2.83	2.69	*** 2.73
TRAVEL BY BUS	1.35	1.44	1.45	1.43
TRAVEL BY TRAIN	1.38	1.39	1.31	1.35
TRAVEL BY MOTORCYCLE	1.27	1.29	1.28	1.28
TRAVEL BY CAR	3.78	3.74	3.65	** 3.70
GROUP TOURS	1.48	1.49	1.52	1.51

Rating Scale: poor = 1 fair = 2 good = 3 excellent = 4  
 STATISTICAL SIGNIFICANCE: \*\*\*p < .001, \*\*p < .01, \*p < .05

#### Vacation Planning and Patterns

The vacation planning and vacation patterns for those familiar with Montana differ from those who are unfamiliar in only two respects. First, familiar respondents tended to report much longer vacations (almost 20 days compared to an average of about 15 days) than respondents who are somewhat or unfamiliar. These are probably tourists in the classic sense of taking a large body of time and thoroughly exploring some part of the country. The second difference is in the reading of articles and books. The pattern here is that the moderately familiar seem to read about travel the most. Probably they report some familiarity with Montana from having read about it in travel and leisure magazines. To the extent that the media plan has targeted these publications, there is some indication of successfully creating at least a moderate level of awareness of Montana; quite an achievement, given the limited budget available.

Table X.6 describes the vacation planning activities and vacation patterns across familiarity levels.

TABLE X.6  
VACATION PLANNING PATTERNS  
ACROSS FAMILIARITY LEVELS

	FAMILIAR W/MT			TOTAL SAMPLE
	FAMILIAR	SOMEWHAT	NOT AT ALL	
USE TRAVEL AGENTS	2.25	2.41	2.26	2.31
READ BOOKS OR ARTICLES	3.11	3.27	3.01	*** 3.11
SEEK FRIENDS ADVICE	3.12	3.28	3.22	3.23
DESTINATION DECISION MONTHS IN ADVANCE	3.20	3.35	3.40	3.35
NUMBER OF OUT OF STATE VACATIONS	4.48	3.97	3.92	4.01
HOW MANY IN WINTER	1.58	1.50	1.34	1.42
HOW MANY IN SUMMER	2.78	2.45	2.57	2.56
DAYS AWAY ON LAST VACATION	19.87	15.78	12.82	*** 14.79

Rating Scale: poor = 1 fair = 2 good = 3 excellent = 4  
(don't know excluded)

STATISTICAL SIGNIFICANCE: \*\*\*P < .001, \*\*P < .01, \*P < .05

#### Perceptions of Montana

Tremendous perceptual differences are associated with increased familiarity. Table X.7 compares the ratings of Montana for those with no, moderate and high familiarity. The pattern of the results is clear. For nine of the thirteen rating categories there is a statistically significant difference



in the perceptions of Montana across the familiarity levels. Further, in most of these cases the increase comes in the jump between those who expressed no familiarity and those who reported that they were somewhat familiar. The implications are obvious. The more a person knows about Montana, the more favorable that person's perceptions are of Montana in general. Further, the higher the rating of Montana as an overall vacation place, to the extent that promotional efforts have increased familiarity, they have also increased the attractiveness of Montana in the minds of their audience.

Interestingly enough, increasing familiarity has not been accompanied by increased ratings of the restaurants, hotels and motels, historical sites and the variety of vacation activities. In short, as familiarity increases, respondents perceptions of the state improved while their assessment of the man-made components of a vacation did not increase significantly. This may be due to the fact that all states are making claims about their restaurants, hotels and historical sites; and Montana, with a limited budget is unable to make its voice heard above the din. Alternatively, it may be that the emphasis on the outdoor aspects of the state in the promotional campaigns is responsible for these relationships.

TABLE X.7  
PERCEPTIONS OF MONTANA ACROSS  
FAMILIARITY LEVELS

	FAMILIAR W/MT			TOTAL SAMPLE	
	FAMILIAR	SOMEWHAT	NOT AT ALL		
SCENIC PLACE TO VISIT	3.52	3.43	3.24	***	3.37
GOOD DOLLAR VALUE	3.08	3.00	2.73	***	2.94
FRIENDLY PEOPLE	3.49	3.37	3.14	***	3.31
HISTORICAL SITES	3.08	3.04	2.95		3.02
ENJOY OUTDOOR REC.	3.66	3.57	3.47	***	3.55
VARIETY OF VAC. ACTIVITIES	3.18	3.07	2.99		3.07
GOOD RESTAURANTS	2.84	2.78	2.61		2.74
FAMILY VACATION	3.39	3.33	3.22	*	3.30
HOTEL AND MOTELS	2.91	3.02	2.82		2.94
CLIMATE	2.86	2.84	2.64	***	2.77
REST RELAX	3.38	3.39	3.19	***	3.31
EASY TO GET TO	2.81	2.66	2.30	***	2.55
OVERALL VACATION PLACE	3.34	3.14	3.89	***	3.07

Rating Scale: poor = 1    fair = 2    good = 3    excellent = 4  
(don't know excluded)

STATISTICAL SIGNIFICANCE: \*\*\*p < .001, \*\*p < .01, \*p < .05

#### Montana Vacation Potential

The next step is to determine the extent to which increased familiarity with Montana is translated into increased intention to visit. Table X.8 compares the vacation intentions of unfamiliar, somewhat familiar, and familiar respondents. The results are again unequivocal. On every item except length of a Montana vacation, increasing familiarity was associated with a more positive response to

Montana as a vacation destination. Familiar respondents saw Montana as closer, more likely to be the primary destination of a direct trip; and assessed their chances of visiting the state and the parks as higher. The picture is now complete. Greater familiarity leads to better perceptions of the state which translate into increased probability of a visit.

TABLE X.8  
MONTANA VACATION POTENTIAL  
ACROSS FAMILIARITY LEVELS

	FAMILIAR W/MT			TOTAL SAMPLE	
	FAMILIAR	SOMEWHAT	NOT AT ALL		
ESTIMATED DRIVING DAYS TO MONTANA	1.84	2.06	2.27	***	2.14
PRIMARY DESTINATION	1.38	1.45	1.51	**	1.47
DIRECT TRIP OR STOP	1.64	1.72	1.85	***	1.78
ESTIMATED DAYS ON MONTANA VACATION	9.95	10.06	9.72		9.86
CHANCE OF VISITING YELLOWSTONE PARK	2.46	2.47	2.23	***	2.34
CHANCE OF VISITING GLACIER PARK	2.44	2.40	2.04	***	2.21
CHANCE OF VISITING MONTANA	2.93	2.68	2.17	***	2.44

Rating Scale: poor = 1 fair = 2 good = 3 excellent = 4  
(don't know excluded)

STATISTICAL SIGNIFICANCE: \*\*\*p < .001, \*\*p < .01, \*p < .05

## Ever Been to Montana Analysis

As was the case with familiarity, increased insight into perceptions of Montana can be gained by comparing respondents who have and have not been in the state. However, before observed differences can be attributed to visiting the state, it is again necessary compare visitors to non-visitors on the various demographic variables. There were no statistically significant differences for: marital status, sex of respondent, rural vs. urban, education, and income range. There were however difference for four of the demographic variables as follows: visitors tended to be older, live closer to Montana and were slightly more likely to report blue collar occupations. Visiting Montana was related to the number of children in such a way as to suggest that the stage in the family life cycle is important. Visitors were most common among those with no children. Visitors were least common among families with one child (probably young families). As the number of children increased, so did the probability that the respondent had visited Montana, probably reflecting more mature families. The crosstabulations for these for demographics are contained in Tables X.9-12. All of these results are in line with the findings of previous research into the characteristics of Montana visitors, and thus are not a surprise.

TABLE X.9  
NUMBER OF CHILDREN FOR  
VISITORS AND NCN-VISITORS

	NUMBER OF CHILDREN				TOTAL SAMPLE
	NO CHILDREN	ONE CHILD	TWO CHILDREN	THREE OR MORE CHILDREN	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT
EVER BEEN IN MONTANA					
NO	35.2	51.2	48.7	43.8	41.9
YES	64.8	48.8	51.3	56.2	58.1

STATISTICAL SIGNIFICANCE:  $p = .001$

TABLE X.10  
AGES OF VISITORS AND NCN-VISITORS

P value ***	AGE OF RESPONDENT					TOTAL SAMPLE
	UNDER 20	20 TO 29	30 TO 44	45 TO 59	60 AND OVER	
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT
EVER BEEN IN MONTANA						
NO	44.4	49.5	44.0	39.4	24.7	41.9
YES	55.6	50.5	56.0	60.6	75.3	58.1

STATISTICAL SIGNIFICANCE:  $p = .001$

TABLE IX.11  
CROSSTABULATIONS OF OCCUPATION AND  
EVER BEEN IN MONTANA

P value ***	OCCUPATION OF RESPONDENT											
	HIGH WHITE	MOD. WHITE	LOW WHITE	GRAY	HIGH BLUE	MOD. BLUE	LOW BLUE	STUDENT	RETIRED	NOT WORKING	9999	TOTAL SAMPLE
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT
EVER BEEN IN MONTANA												
NO	43.1	42.3	44.1	54.1	40.2	46.7	37.5	49.3	26.8	42.9	100.0	41.9
YES	56.9	57.7	55.9	45.9	59.8	53.3	62.5	50.7	73.2	57.1	.	58.1

TABLE IX.12  
CROSSTABULATION OF REGION BY  
EVER BEEN IN MONTANA

P value ***	REGION											
	MINN WIS EASTERN	WYO	IDAHO	WASH ORE	NEV	SO CAL	CANADA	N.D. AND S.D.	MICH IND ILL	UTAH	COLO	ALBERTA SASKAT- CHEWAN
	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT	PERCENT
EVER BEEN IN MONTANA												
NO	49.7	70.6	11.0	38.6	36.9	58.4	25.5					41.9
YES	50.3	29.4	89.0	61.4	63.1	41.6	74.5					58.1

## Vacation and Recreational Activities

Now that the demographic differences have been examined, it is appropriate to begin to consider other types of differences between visitors and non-visitors. As a first step, consider the reported frequency of vacation and recreational activities as described by Table X.13.

TABLE X.13  
OUTDOOR RECREATION ACTIVITY FREQUENCIES  
FOR VISITORS AND NCN-VISITORS

	EVER BEEN IN MONTANA		TOTAL SAMPLE
	NO	YES	
SPEND TIME AT BEACH	2.74	2.69	2.71
GO CAMPING	2.40	2.64	*** 2.54
GO SKIING	1.93	2.04	2.00
SNOWMOBILING	1.43	1.47	1.45
GO FISHING	2.61	2.66	2.64
GO HUNTING	1.74	1.89	1.83
HIKE, CLIMB OR PACK	1.94	2.24	*** 2.12
GO BOATING, CANOE OR RAFT	2.42	2.44	2.43

Rating Scale: poor = 1 fair = 2 good = 3 excellent = 4  
(don't know excluded)

STATISTICAL SIGNIFICANCE: \*\*\*p < .001, \*\*p < .01, \*p < .03

The results suggest that there are not great differences in the outdoor activity patterens of those who have visited the state and those who have not with two exceptions. Montana visitors appear to camp, hike, climb and/or

backpack more frequently than those who have not visited Montana. This seems reasonable, since these activities are among the key attractions of the state. It is perhaps surprising that there were not differences between non-visitors and visitors on some of the other activities (which represent important vertical segments in the promotion plan). One possible explanation is that these relationships are obscured by the various varieties of these activities available (for example there is bird hunting, deer hunting and other big game hunting; some of which people may visit Montana to participate in and some of which may not bring people to Montana). To eliminate the possibility that the lack of relationships might be attributable to these variations, analysis was done comparing reported frequency of each of the subcategories for visitors and non-visitors. With the exception of hunting other big game, there were no significant differences here either. Rather, there are just not the expected differences. While fishermen may be more likely to come to Montana in the future, they are not also more likely to have already been here.

Visitors differ from non-visitors on some of the measures of frequency of various vacation activities. Table X.14 describes the frequency with which visitors and non-visitors report engaging in a number of vacation activities. The results suggest that respondents who have been to Montana are also more frequently found visiting historical sites, museums, national and state parks and are somewhat less likely to visit big cities and night clubs. This pattern of responses is congruent with that reported above for familiarity. One of the attractions that Montana seems to offer is the uniqueness of the state and, as a result, Montana attracts people interested in the new and unusual, particularly when these things are associated with some historical significance. These findings suggest a campaign that stresses the unique and unusual aspects of a Montana vacation.



TABLE X.14  
VACATION ACTIVITY RATINGS OF  
VISITORS AND NCN-VISITORS

	EVER BEEN IN MONTANA		TOTAL SAMPLE
	NO	YES	
VISIT MUSEUMS	2.64	2.88	*** 2.78
PLAY GOLF	1.90	1.81	1.85
TRAVEL TO SIGHTSEE	3.32	3.35	3.34
VISIT A RESORT	2.47	2.47	2.47
NAT. OR STATE PARKS	2.97	3.22	*** 3.11
SEE BIG CITIES	2.57	2.43	* 2.49
VISIT HISTORIC PLACES	2.94	3.07	*** 3.02
FINE RESTAURANTS	2.90	2.79	2.84
NIGHT CLUBS	2.28	2.10	* 2.18

Rating Scale: poor = 1    fair = 2    good = 3    excellent = 4  
(don't know excluded)

STATISTICAL SIGNIFICANCE: \*\*\*p < .001, \*\*p < .01, \*p < .05

#### Travel Mode and Behavior

There were almost no differences between the travel patterns of visitors and non-visitors, as can be seen in Table X.15. The only statistical difference, and a marginal one at that, was associated with bus travel. Visitors were slightly less likely to report traveling by bus, but the differences are very slight.

TABLE X.15  
TRAVEL MODE AND BEHAVIOR OF VISITORS  
AND NON-VISITORS

	EVER BEEN IN MONTANA		TOTAL SAMPLE
	NO	YES	
TRAVEL LONG DISTANCES	3.17	3.28	3.23
TRAVEL BY AIR	2.79	2.69	2.73
TRAVEL BY BUS	1.48	1.40 *	1.43
TRAVEL BY TRAIN	1.37	1.33	1.35
TRAVEL BY MOTORCYCLE	1.29	1.27	1.28
TRAVEL BY CAR	3.68	3.70	3.70
GROUP TOURS	1.50	1.51	1.51

Rating Scale: poor = 1 fair = 2 good = 3 excellent = 4  
(don't know excluded)

STATISTICAL SIGNIFICANCE: \*\*\*p < .001, \*\*p < .01, \*p < .05

#### Vacation Planning Patterns

The major differences between those who have visited Montana and those who have not can be summarized by noting that visitors reported more out of state vacations, more winter vacations and their vacations tended to be about three and one-half days longer. As such, these results probably just indicate that people who take more and longer vacations are more likely to travel to or through Montana. They are probably equally likely to have visited any one of a number of states and no special significance can be attributed to these results, contained in Table X.16.

TABLE X.16  
VACATION PLANNING PATTERNS OF VISITORS AND  
NON-VISITORS

	EVER BEEN IN MONTANA		TOTAL SAMPLE
	NO	YES	
USE TRAVEL AGENTS	2.30	2.32	2.31
READ BOOKS OR ARTICLES	3.05	3.15	3.11
SEEK FRIENDS ADVICE	3.28	3.19	3.23
DESTINATION DECISION MONTHS IN ADVANCE	3.47	3.27	3.35
NUMBER OF OUT OF STATE VACATIONS	3.45	4.41	** 4.01
HOW MANY IN WINTER	1.18	1.59	* 1.42
HOW MANY IN SUMMER	2.29	2.75	2.56
DAYS AWAY ON LAST VACATION	12.72	16.24	** 14.79

Rating Scale: poor = 1 fair = 2 good = 3 excellent = 4  
(don't know excluded)

STATISTICAL SIGNIFICANCE: \*\*\*p < .001, \*\*p < .01, \*p < .05

#### Perceptions of Montana

Just as was the case with familiarity, there are significant differences in the perceptions of Montana held by individuals who have been in the state when compared to perceptions of those who have never been here. Table X.17 presents the average rating of Montana on the 13 perception variables for both visitors and non-visitors. There are four categories on which the ratings are statistically significantly different, depending on whether the rater had ever

been in the state. Visitors rated Montana as significantly better in terms of climate, friendly people, and accessability.

Those who have been to Montana rate the state more highly (3.14) as an overall vacation place than those who have never visited (mean rating = 2.94). This suggests that prmotional efforts which bring visitors to the state once are likely to lead to repeat visits as well as positive word of mouth.

TABLE X.17  
RATINGS OF MONTANA BY VISITORS  
AND NON-VISITORS

	EVER BEEN IN MONTANA		TOTAL SAMPLE
	NO	YES	
SCENIC PLACE TO VISIT	3.34	3.39	3.37
GOOD DOLLAR VALUE	2.94	2.94	2.94
FRIENDLY PEOPLE	3.17	3.36	*** 3.31
HISTORICAL SITES	2.97	3.04	3.02
ENJOY OUTDOOR REC.	3.51	3.57	3.55
VARIETY OF VAC. ACTIVITIES	3.07	3.06	3.07
GOOD RESTAURANTS	2.66	2.76	2.74
FAMILY VACATION	3.22	3.33	3.30
HOTEL AND MOTELS	2.83	2.96	2.94
CLIMATE	2.64	2.82	*** 2.77
REST RELAX	3.29	3.32	3.31
EASY TO GET TO	2.24	2.68	*** 2.55
OVERALL VACATION PLACE	2.94	3.14	*** 3.07

Rating Scale: poor = 1 fair = 2 good = 3 excellent = 4  
(don't know excluded)

STATISTICAL SIGNIFICANCE: \*\*\*p < .001, \*\*p < .01, \*p < .05

#### Montana Vacation Potential

Probably the most significant differences between respondents who had visited and respondents who had not is in the likelihood and descriptions of a potential Montana vacation. Table X.18 shows statistically significant

differences for all but two of the vacation variables. Visitors tended to report a higher probability of visiting Montana, and either Glacier or Yellowstone National Parks. They saw Montana as nearer (about half a driving day), planned to spend about a day longer and were more likely to make a direct trip to the state. While these differences are at least partly attributable to the propinquity of visitors, it is also likely that those who have been here do not see the distances involved as being such a problem. The results also suggest that if Montana can get vacationers here once, they are likely to return at a later opportunity.

TABLE X.18  
MONTANA VACATION POTENTIAL FOR  
VISITORS AND NON-VISITORS

	EVER BEEN IN MONTANA			TOTAL SAMPLE
	NO	YES		
ESTIMATED DRIVING DAYS TO MONTANA	2.45	1.92	***	2.14
PRIMARY DESTINATION	1.48	1.46		1.47
DIRECT TRIP OR STOP	1.87	1.71	***	1.78
ESTIMATED DAYS ON MONTANA VACATION	10.40	9.47	*	9.86
CHANCE OF VISITING YELLOWSTONE PARK	2.28	2.38	*	2.34
CHANCE OF VISITING GLACIER PARK	2.03	2.34	***	2.21
CHANCE OF VISITING MONTANA	2.15	2.65	***	2.44

Rating Scale for Chances: very low = 1 low = 2 high = 3 very high = 4  
(don't know excluded)

STATISTICAL SIGNIFICANCE: \*\*\*p < .001, \*\*p < .01, \*p < .05

### Free Associations with Montana

A major purpose of the study was to determine people's impressions of Montana - what came to their minds when they thought of Montana. The Davidson-Peterson report of 1980 (described earlier in the Literature Review of this report) concluded, among other things, that rather than having a negative impression, most people have no impression of Montana. The current study, then, would determine if that were (still) the case and also obtain a more precise idea of what people's impressions are.

Respondents were asked first to provide two or three words that came to mind when they thought of Montana. Table X.19 provides both counts and percentages, by region, of the concepts mentioned. In order to simplify the interpretations, similar responses were combined into more molar categories (for example pretty, scenic and beautiful were combined). They are rank-ordered with the most frequently mentioned appearing at the top of the table. The first important finding is that the state of Montana still doesn't have a strong and stable image in the minds of respondents. The second to last row of the table reports the number of "no responses" that were obtained. Some respondents could not even provide a single response. This number should be compared to three times the number of respondents, since each respondent was asked for three words that would describe Montana. Across the sample, there were a total of 1095 occasions where the respondent was unable to come up with a descriptor for Montana. Put another way, on the average, respondents were only able to generate 2.11 responses when asked for three. This is evidence of lack of a well developed image. It is unlikely that respondents would have trouble producing three words to describe the states of California or New York. As indicated by the Davidson-Peterson reports, Montana is still not fully articulated in the minds of the respondents to the survey.

Now, consider the concepts that were produced by the respondents who were able to provide one or more free associations. Note first of all that four of

the top six ranking words or concepts are favorable impressions. Across the entire sample, people tend to perceive Montana as scenic, and as having mountains, big blue sky, and lots of trees. They also, undeniably, perceive it to be desolate, barren, and cold. More specifically, residents of Region 3 (the states physically bordering on or near Montana) perceived Montana as scenic far more than the other regions, and along with Region 6 (the Southwest) perceived it relatively to be more wooded. Residents of the near Midwest (Wisconsin, Minnesota, and Eastern Dakotas) mentioned relatively more often than people in other regions the concepts of "big, desolate, open, barren," big mountains, and fishing. In Region 2, (Michigan, Illinois, Indiana) relatively more respondents mentioned "western," cowboys, and Indians. Regions 4 (Colorado, Utah) and 5 (the Northwest) displayed impressions very similar to those for the sample as a whole. People in region 6 (the Southwest), in addition to making relatively more mentions of "lots of trees," also perceived Montana as more desolate or open, colder, and as having big mountains more than respondents in other regions. Finally, Region 7 (Canada) perceived Montana to be "plains, flat, prairie," to have good skiing and fishing, and friendly people relatively more than other regions. Canadians also were less likely to perceive Montana as having lots of trees and as being cold.

#### The Best and Worst Aspects of a Montana Vacation

Respondents also were asked what single thing they would enjoy most about a Montana vacation. These findings appear in Table X.20 with the features appearing in order of the number of mentions, and the counts appearing by regions. Consistent with the preceding discussion, the most popular aspect of a Montana vacation is scenic beauty. Fishing ranked second, mountains third, "getting away" fourth, camping fifth, and skiing sixth. Residents of Region 2 (Michigan, Illinois, Indiana) mentioned fishing twice as often as respondents from other regions, and they were responsible for six of the seven total



mentions of horses or riding. Residents of Region 3 (Wyoming, Idaho, and Western Dakotas) were more apt to mention the "outdoors." Finally, Canadians (Region 7) mentioned skiing far more times (27) than any other region; (a distant "second" was Region 5 (the Northwest, with 10). Canadians also made five of the eight total references to "friendly people" in Montana.

The last free association question asked respondents to describe what they saw as the single thing that they would enjoy least about a Montana vacation. As Table X.21 reveals, two ideas dominated what people like least; that Montana is a long distance away from where they are (148 total mentions) and that it is cold in Montana in the winter (132 mentions). However, thirty-two people (9 from the Northwest) felt Montana to be too hot! Respondents in Regions 1, 2, 3, and 4 felt more than the others that Montana is sparse and barren. Five respondents, all from the Southwest region (6) confided that what they liked least about Montana was their lack of knowledge about it. 32 respondents, all Canadians (Region 7) said the strength of the U.S. dollar against Canadian currency was what they liked least about Montana.

TABLE X.19

WORDS OR CONCEPTS FREELY ASSOCIATED WITH MONTANA, BY REGION COUNTS,  
FOLLOWED BY PERCENT OF RESPONDENTS IN THE REGION

Word/Concept	By Region											Canada	Total		
	Minn-Wis END-ESD	Mich-Ind Ill	Wyo-Ida WND-WSD	Colo Utah	Wash-Ore Nev-NCal	SCal-Az NH-WTex	Wash-Ore Nev-NCal	Colo Utah	Wyo-Ida WND-WSD	Mich-Ind Ill					
Pretty/Scenic	74	.389	67	.335	72	.48	58	.397	51	.27	49	.32	53	.265	424
Big, Desolate, Open, Barren	64	.337	39	.195	38	.259	33	.226	55	.291	53	.346	35	.175	317
Big Mountains	50	.263	26	.13	26	.177	27	.185	31	.164	37	.242	26	.13	223
Cold	11	.058	14	.07	11	.075	26	.178	25	.132	32	.209	2	.01	121
Blue Sky, Big Sky, God's Ctry	19	.10	8	.04	16	.109	20	.137	15	.079	12	.078	15	.075	95
Wooded, Forest, Lots of Trees	13	.068	9	.045	14	.095	11	.075	12	.063	15	.098	6	.03	80
Remote, Rural, Few People	13	.068	17	.085	6	.041	11	.075	10	.053	12	.078	7	.036	75
Western, Cowboys, Indians	3	.016	18	.09	6	.041	3	.021	6	.032	10	.065	4	.02	50
Plains, Flats, Prairie	11	.058	5	.025	2	.014	3	.021	5	.026	2	.013	22	.11	50
Friendly People	4	.02	2	.01	6	.041	0		4	.021	5	.033	19	.095	40
Fishing, Good Fishing	11	.058	1	.005	5	.034	6	.041	5	.026	5	.033	3	.015	36
Skiing, Good Skiing	1	.005	3	.015	2	.014	3	.021	1	.005	0		17	.085	27
Hunting	4	.02	2	.01	0		3	.021	3	.016	3	.02	1	.005	16
Glacier Park	4	.02	1	.005	1	.007	0		2	.011	3	.02	1	.005	12
National Parks	0		0		2	.014	0		5	.026	1	.007	3	.015	10
Yellowstone Park	1	.005	0		1	.007	1	.007	1	.005	1	.007	1	.005	6
No Response	163		216		85		127		165		122		217		1095
Number of Respondents	190		200		147		146		189		153		200		1225

TABLE X.20

FREE RESPONSES: THE BEST ASPECT OF A MONTANA VACATION  
BY REGION WITH COUNTS AND PERCENT OF RESPONDENTS

Word/Concept

By Region

	Minn-Wis END-ESD	Mich-Ind Ill	Wyo-Ind WND-WSD	Colo Utah	Wash-Ore Nev-NCal	SCal-Az NM-WTex	Canada	Total	
Scenic/Beauty	51	.27	28	.190	43	.295	40	.20	280
Fishing	8	.042	18	.122	13	.089	4	.02	111
Mountains	22	.116	16	.109	12	.082	7	.035	98
Getting Away	6	.032	9	.061	12	.082	12	.06	79
Camping	9	.047	8	.054	6	.041	5	.025	54
Skiing	5	.026	4	.027	2	.014	27	.135	52
Outdoors	6	.032	12	.082	5	.034	1	.005	46
National Parks	10	.05	4	.027	1	.007	2	.01	29
Wilderness (Rugged)	10	.053	5	.034	2	.014	2	.01	28
Fresh Air	3	.016	5	---	2	.014	2	.01	26
Glacier Park	4	.02	4	.027	6	.041	2	.01	24
History/Western	6	.032	5	.034	---	---	---	---	23
Yellowstone Park	4	.02	4	.027	1	.007	5	.025	22
Lakes/Rivers	1	.005	3	.015	1	.007	3	.015	17
Few People	2	.011	2	.014	2	.014	2	.01	16
Open	2	.011	3	.020	---	---	1	.005	15
Hunting	2	.011	4	.027	1	.007	2	.011	15
Animals	2	.011	2	.01	2	.014	5	.026	14
Hiking/Backpacking	3	.016	3	.015	3	.021	---	---	13
Ranches	---	---	1	.014	3	.021	---	---	11
Friendly People	2	.011	4	.02	2	.011	5	.025	8
Horses-riding	2	.011	1	.007	---	---	---	---	7
Boating/Rafting	1	.005	6	.03	---	---	1	.005	6
	1	.005	3	.015	1	.007	---	---	---
No Response	28		14		13	18	39		181
Number of Respondents	190	200	147	147	189	153	200		1225

TABLE X.21

FREE ASSOCIATIONS: NEGATIVE ASPECTS OF A MONTANA VACATION  
COUNTS FOLLOWED BY PERCENTAGE OF RESPONDENTS

Word/Concept	By Region												Total
	Minn-Wis END-ESD	Mich-Ind Ill	Wyo-Ida WND-WSD	Colo Utah	Wash-Ore Nev-NCal	SCal-Az NM-WTex	Canada						
Long Drive/Distance to MT	30	.158	16	.109	21	.144	21	.111	14	.092	21	.105	148
Cold/Winter	18	.095	14	.07	18	.122	25	.171	20	.131	10	.05	132
Sparse, Barren	11	.058	15	.075	8	.054	11	.075	5	.033	6	.03	63
Nothing To Do	5	.026	11	.055	7	.048	7	.048	11	.072	7	.035	60
Dollar	--	--	--	--	--	--	--	--	--	--	32	.16	32
Too Hot	5	.026	4	.027	1	.007	1	.048	1	.007	8	.04	32
Bugs	2	.011	4	.027	1	.007	1	.021	--	--	1	.005	16
Mtns - High Alt.	6	.032	6	.03	2	.014	--	--	--	--	--	--	14
E. Montana	1	.005	1	.005	7	.047	1	.007	1	.007	--	--	11
Roads	3	.016	3	.020	2	.014	--	--	--	--	2	.01	10
Bears	2	.011	1	.005	--	.014	--	.005	1	.007	2	.01	7
Camping	3	.016	1	.005	2	.014	--	--	--	--	--	--	6
Snakes	1	.005	1	.005	--	--	--	.005	1	.007	1	.005	12
Lack of Knowledge	--	--	--	--	--	--	--	--	5	.033	--	--	5
No Response	90	88	86	55	77	99	72	567	99	153	72	567	567
Number of Respondents	190	200	147	146	189	153	200	1225	153	1225	200	1225	1225

## CHAPTER XI

### MONTANA VACATION POTENTIAL

This chapter describes the target market for Montana vacation and tourism promotion comparing the response of sample members who reported differing levels of probability of a visit to Montana within the next two years. Special attention will be paid to the 15% of the sample who reported a "very high" chance of a Montana visit.

In the first section, the demographic profiles of likely Montana visitors are presented. Then, in the subsequent parts, likely visitors are compared to those reporting lesser probabilities on the various other measures.

#### Demographic Profiles

To target potential visitors effectively for the promotional push that could convert them into actual tourists, it is useful to compare the demographic profiles of respondents who differed in their interest in visiting Montana. Analyses were run comparing the respondents who were and were not likely to visit across the various demographics: marital status, number and ages of children, age of respondent, urban or rural residence, educational level, occupational status, region, and income. Four demographic characteristics exhibited statistically significant patterns related the reported probability of a Montana vacation.

Region of residence was the strongest of the four. As depicted in Figure XI.1, the closer the closer the respondent lived to Montana, the greater the reported chances of visiting. The surrounding states and Canada reported the

greatest probability of coming for a vacation. The far midwest and the southwest reported the lowest probabilities.

The second strongest relationship was between the chance of visiting Montana and the occupational status of the respondent. As demonstrated in Figure XI.2, the highest propensity to vacation in Montana was reported by lower level blue collar respondents (factory workers, construction laborers, etc.). The higher level blue collar workers (die makers, shop foremen, etc.) were also quite likely to say they might come (50% responding "high" or "very high"). These findings are in accord with the Davidson Peterson emphasis on blue collar workers.

A surprise finding was the of interest among the white collar segments of the sample. The second highest incidence of selecting "high" or "very high" was among moderate white collar workers (middle management, technical, etc.). This finding suggests that targeting too narrowly on the blue collar segment may ignore a large and potentially profitable segment. Recall the previous analysis in which it was suggested that blue collar and white workers differed in their leisure and vacation activities. Seemingly, the blue collar workers are attracted to Montana for the fishing and hunting while the white collar segments are more interested in the resorts, skiing, sight seeing, and historical aspects of the state.

Income was the third significant demographic difference between respondents who varied in their reported chances of visiting the state. Figure XI.3 suggests that the key segment is fairly well off (household income between \$30,000 and \$50,000 yearly). Keeping in mind that many of these individuals fall in the blue collar category occupationally, one might conclude that Montana is considered as an attractive destination by the relatively more affluent segment of the populace (the blue collar respondents could easily fall in this income range if both spouses were employed).

The age of the respondent was the final variable which was useful in distinguishing between likely visitors and those who reported a low probability of coming. The results of this analysis are contained in Figure XI.4. Respondents between the ages of 20 and 44 reported significantly greater likelihood of a Montana vacation than did their younger or older counterparts.

In summary, the demographic analysis of the respondents who reported increased potential for a Montana vacation suggests that the a typical target visitor would be from a nearby region, hold a low level blue collar or a moderate level white collar job, be reasonably affluent and between 20 and 44 years old.

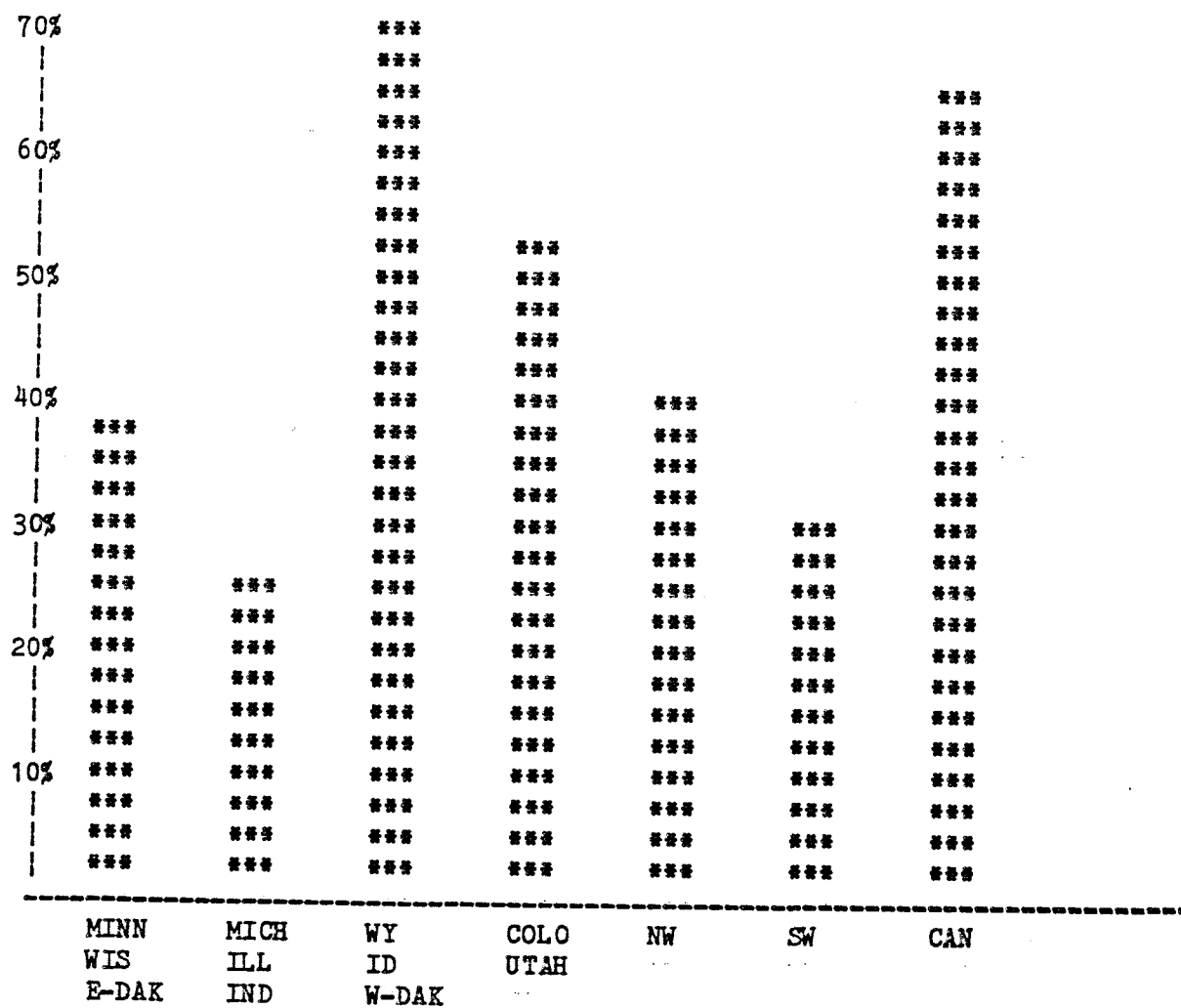


FIGURE XI.1  
 PERCENT REPORTING HIGH OR VERY HIGH  
 CHANCE OF TRAVELING IN MONTANA BY REGION



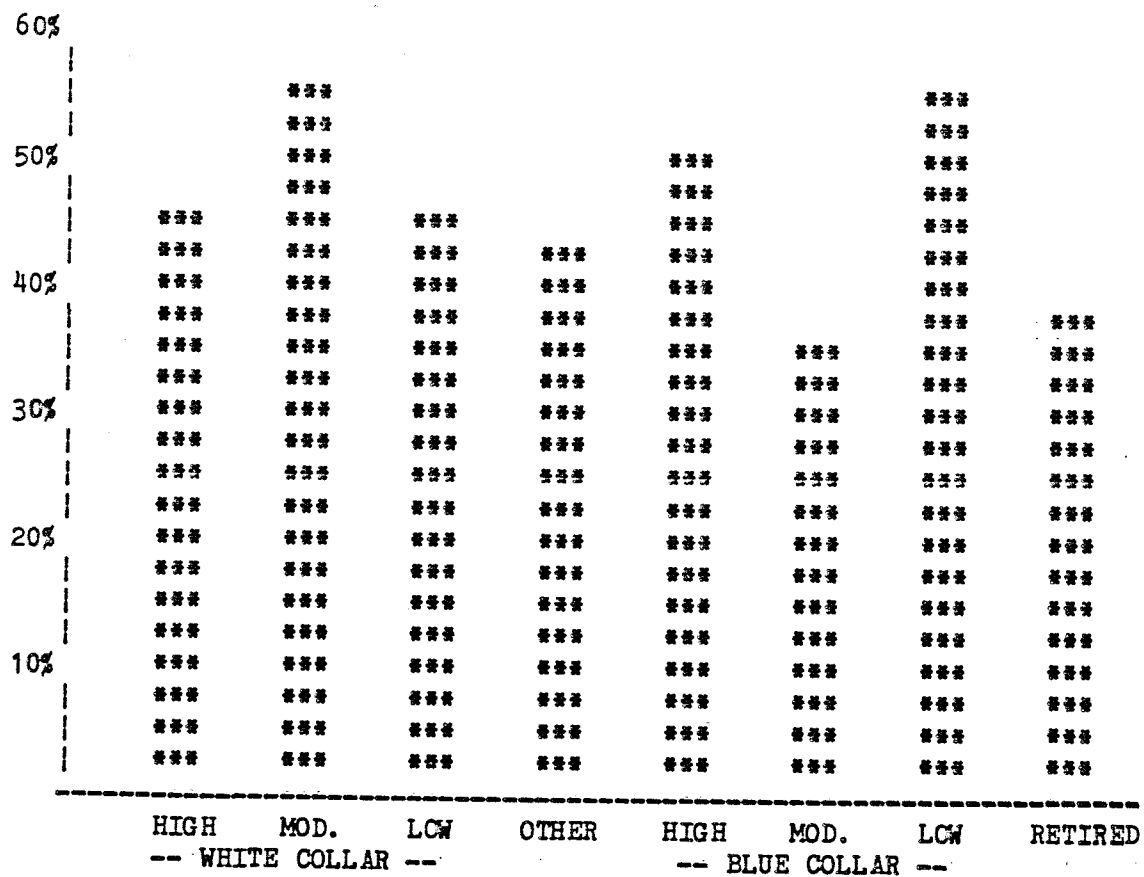


FIGURE XI.2

PERCENT REPORTING HIGH OR VERY HIGH  
CHANCE OF TRAVELING IN MONTANA BY OCCUPATION

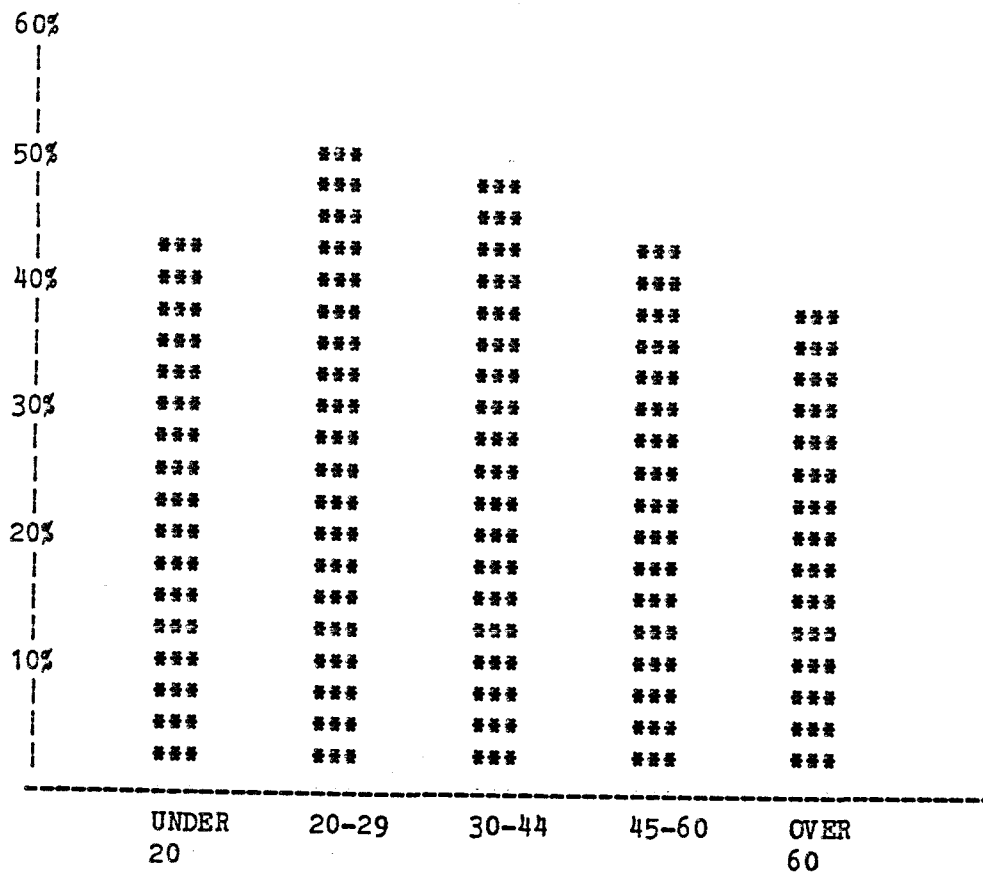


FIGURE XI.3  
PERCENT REPORTING HIGH OR VERY HIGH  
CHANCE OF TRAVELING IN MONTANA BY AGE

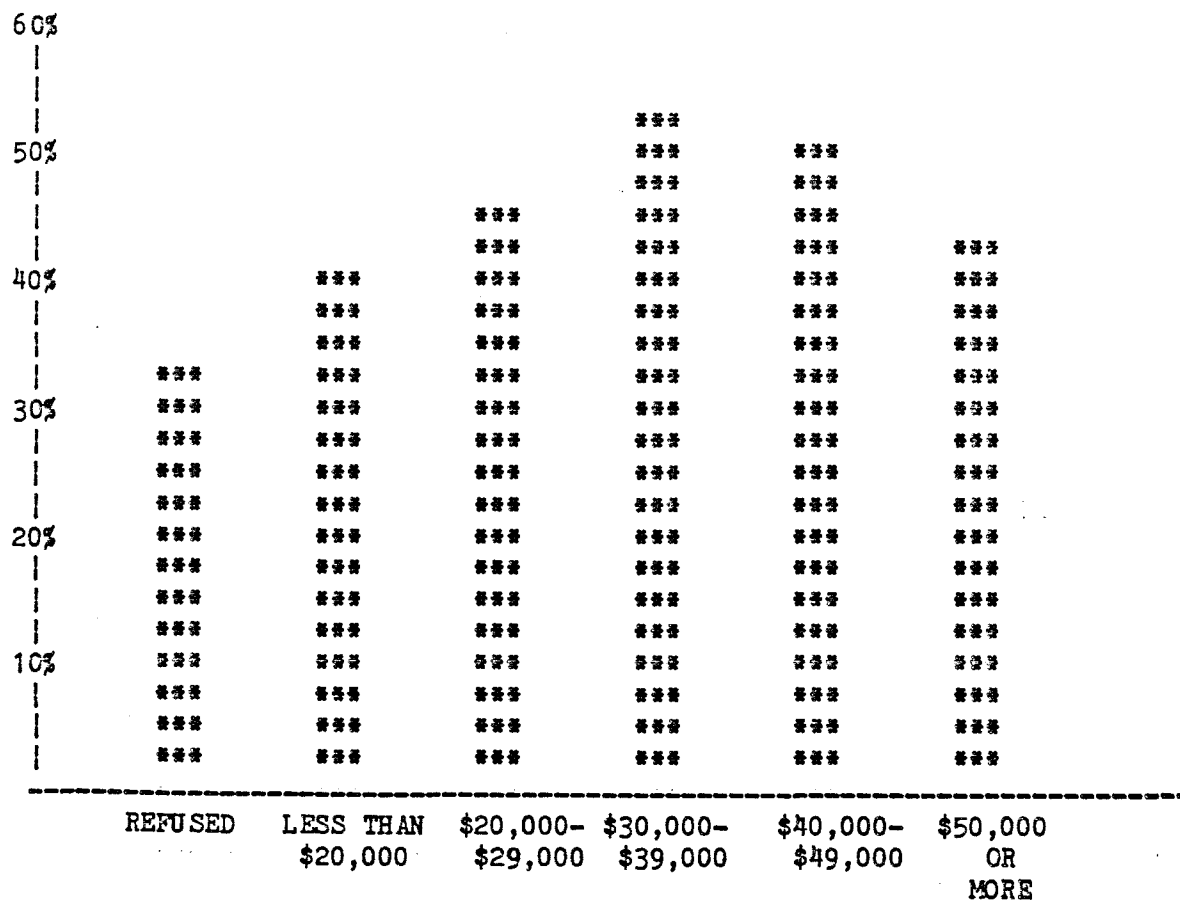


FIGURE XI.4

PERCENT REPORTING HIGH OR VERY HIGH  
CHANCE OF TRAVELING IN MONTANA BY INCOME

TABLE XI.5  
OUTDOOR RECREATION ACTIVITIES  
TABULATED BY CHANCE OF VISITING MONTANA

	CHANCE OF VISITING MONTANA				TOTAL SAMPLE
	VERY LOW	LOW	HIGH	VERY HIGH	
SPEND TIME AT BEACH	2.49	2.74	2.85	2.72	** 2.72
GO SKIING	1.78	1.91	2.18	2.18	** 2.01
SNOWMOBILING	1.35	1.47	1.48	1.54	** 1.46
GO FISHING	2.41	2.67	2.64	2.89	** 2.64
GO HUNTING	1.52	1.79	1.96	2.09	** 1.83
HIKE, CLIMB OR PACK	1.75	2.06	2.32	2.40	** 2.13
GO BOATING, CANOE OR RAFT	2.11	2.43	2.58	2.61	** 2.43
GO CAMPING	2.12	2.47	2.76	2.86	** 2.71

Rating Scale: never = 1 rarely = 2 sometimes = 3 often = 4  
STATISTICAL SIGNIFICANCE: \*P < .05, \*\*p < .01

### Outdoor Recreation Activities

As might be expected, given the perceptions of Montana as an outdoor paradise, there was a statistically significant increasing monotonic relationship between all of the outdoor recreation activities and reported chances of a Montana vacation. Put less technically, respondents who were more likely to vacation in Montana were also more likely to report engaging in all of the outdoor activities. Given the previous findings, which suggested that participation in those activities are highly intercorrelated, the sweep

across all activities is not a surprise. The results (presented in Table XI.5) reaffirm the conclusion that likely Montana visitors are outdoors people who participate in a wide variety of outdoor recreational activities.

#### Other Vacation or Pleasure Trip Activities

Potential Montana travelers differ from those who report a lesser chance of a Montana visit on five of the nine vacation and pleasure trip activities. Potential vacationers reported greater incidence of visiting museums, traveling to sightsee, visiting resorts, and visiting historic places and visiting national and state parks. Taken together, these items paint a picture of the target market as being interested in Montana for the state's unique and different image. Montana should capitalize on the allure and mystique of the state in its promotional efforts. Potential vacationers would seem to be motivated by the "new and different" and could likely be converted to actual travelers if they could be convinced that Montana had unique sights, history, and resorts.

TABLE XI.6  
VACATION OR PLEASURE TRIP ACTIVITIES  
TABULATED BY CHANCE OF VISITING MONTANA

	CHANCE OF VISITING MONTANA				TOTAL SAMPLE
	VERY LOW	LOW	HIGH	VERY HIGH	
VISIT MUSEUMS	2.62	2.76	2.87	2.89	** 2.78
PLAY GOLF	1.75	1.85	1.89	1.90	1.85
TRAVEL TO SIGHTSEE	3.18	3.34	3.43	3.34	** 3.33
VISIT A RESORT	2.27	2.45	2.58	2.58	** 2.47
NAT. OR STATE PARKS	2.75	3.07	3.28	3.42	** 3.12
SEE BIG CITIES	2.38	2.48	2.58	2.51	2.49
VISIT HISTORIC PLACES	2.89	2.95	3.14	3.07	** 3.01
FINE RESTAURANTS	2.75	2.79	2.93	2.84	2.83
NIGHT CLUBS	2.02	2.22	2.18	2.27	2.17

Rating Scale: never = 1 rarely = 2 sometimes = 3 often = 4  
 STATISTICAL SIGNIFICANCE: \*p < .05, \*\*p < .01

#### Modes of Travel

As revealed in Table XI.6, there were three significant differences between high and low probability respondents. Potential vacationers reported more car travel, and were more prone to travel long distances on vacation. The results for train travel were more complex. Respondents who had a "very low" or "very high" probability of a Montana visit were less apt to travel by train than respondents who reported more moderate travel probabilities.

Interestingly enough, air travel reports were not statistically significantly different for the various groups. In all probability, these potential visitors see themselves coming to the state by auto, which fits with the previous section's description of their intentions to sightsee and visit historical places and parks. All of these activities are better accomplished when one has an automobile.

TABLE XI.7  
TRAVEL MODE AND BEHAVIOR  
TABULATED BY CHANCE OF VISITING MONTANA

	CHANCE OF VISITING MONTANA				TOTAL SAMPLE
	VERY LOW	LOW	HIGH	VERY HIGH	
TRAVEL LONG DISTANCES	3.09	3.17	3.32	3.40	** 3.23
TRAVEL BY AIR	2.86	2.70	2.72	2.63	2.73
TRAVEL BY BUS	1.45	1.45	1.44	1.34	1.43
TRAVEL BY TRAIN	1.25	1.42	1.36	1.29	** 1.34
TRAVEL BY MOTORCYCLE	1.22	1.30	1.33	1.24	1.28
TRAVEL BY CAR	3.55	3.73	3.76	3.75	** 3.70
GROUP TOURS	1.56	1.49	1.47	1.45	1.49

Rating Scale: never = 1 rarely = 1 sometimes = 3 often = 4  
STATISTICAL SIGNIFICANCE: \*p < .05, \*\*p < .01

## Vacation Planning

The potential vacationers are compared to less likely visitors on the vacation planning variables in Table XI.7. Those who express a "high" or "very high" probability of a Montana vacation are somewhat more likely to read books or articles and consult friends and relatives as a source of destination information. They also tend to take more out of state vacations, particularly in the winter.

TABLE XI.8  
VACATION PLANNING AND PATTERNS  
TABULATED BY CHANCE OF VISITING MONTANA

	CHANCE OF VISITING MONTANA				TOTAL SAMPLE
	VERY LOW	LOW	HIGH	VERY HIGH	
USE TRAVEL AGENTS	2.47	2.28	2.22	2.31	2.31
READ BOOKS OR ARTICLES	2.95	3.03	3.24	3.30	** 3.12
SEEK FRIENDS ADVICE	3.04	3.27	3.32	3.26	** 3.23
DESTINATION DECISION MONTHS IN ADVANCE	3.42	3.44	3.11	3.53	3.36
NUMBER OF OUT OF STATE VACATIONS	3.62	3.51	4.31	4.89	** 3.99
HOW MANY IN WINTER	1.18	1.20	1.49	2.06	** 1.42
HOW MANY IN SUMMER	2.41	2.29	2.90	2.65	2.55
DAYS AWAY ON LAST VACATION	13.58	13.69	16.27	16.30	**14.84

Rating Scale for Travel Agents, Books, Friends:

never = 1 rarely = 2 sometimes = 3 often = 4

STATISTICAL SIGNIFICANCE: \*p < .05, \*\*p < .01



### Perceptions of Montana

Table XI.8 profiles the perceptions of the various respondents. As might be expected, potential vacationers viewed the state more favorably on all but four of the 13 perceptual measures. Significantly, the items where there were no significant differences relate to dollar value, hotels and motels, restaurants, and the variety of vacation activities. Seemingly, those aspects of a Montana vacation are not well known, even to those with a high propensity to visit the state.

The positive relationship between perception of Montana and intention to visit reaffirms the importance of travel promotion. To the extent that promotional efforts can improve public perceptions of Montana as a vacation destination, more travelers may be expected to actually visit the state. The results also suggest the importance of communication about the variety and quality of accommodations and services available to visitors.

TABLE XI.9  
PERCEPTIONS OF MONTANA  
TABULATED BY CHANCE OF VISITING MONTANA

	CHANCE OF VISITING MONTANA				TOTAL SAMPLE
	VERY LOW	LOW	HIGH	VERY HIGH	
SCENIC PLACE TO VISIT	3.21	3.26	3.45	3.54	** 3.37
GOOD DOLLAR VALUE	2.74	2.90	2.98	2.99	2.93
FRIENDLY PEOPLE	3.16	3.23	3.36	3.46	** 3.31
HISTORICAL SITES	2.79	2.88	3.18	3.14	** 3.03
ENJOY OUTDOOR REC.	3.40	3.49	3.59	3.70	** 3.55
VARIETY OF VAC. ACTIVITIES	3.00	2.99	3.12	3.15	3.07
GOOD RESTAURANTS	2.69	2.65	2.76	2.89	2.75
FAMILY VACATION	3.15	3.19	3.37	3.47	** 3.30
HOTEL AND MOTELS	2.88	2.85	3.03	2.93	2.94
CLIMATE	2.63	2.70	2.83	2.87	** 2.77
REST RELAX	3.24	3.22	3.39	3.40	** 3.32
EASY TO GET TO	2.20	2.39	2.64	2.94	** 2.56
OVERALL VACATION PLACE	2.72	2.94	3.22	3.25	*** 3.07

Rating Scale: poor = 1 fair = 2 good = 3 excellent = 4  
(don't know excluded)

STATISTICAL SIGNIFICANCE: \*p < .05, \*\*p < .01

### Summary

Potential Montana visitors (those who reported a "high" or "very high" probability of a Montana vacation) were significantly different from respondents less likely to visit the state on both demographic and psychographic dimensions. Careful attention to these data should result in effective media and message choices for promoting the state as a tourist destination.

APPENDIX I

TOURISM QUESTIONNAIRE

Hello, my name is \_\_\_\_\_.

I'm a student at a University in the west which I will be happy to identify later. We're calling a sample of people to learn more about the way people vacation and travel.

Has anyone in your household taken an out of state vacation or pleasure trip in the last two years?

IF YES:

IF NO:

Is anyone in your household considering an out of state pleasure or vacation trip?

IF YES: \_\_\_\_\_

IF NO:

Well, we really need to talk with people who will be traveling.  
Thank you for your time. Good-bye.

->Are you an adult who helps plan vacation and pleasure trips? <-----|

IF NO:

May I speak to an adult who helps plan trips?

WHEN YES:

Please tell me the three main vacation activities that you, or your family, enjoy.

\_\_\_\_\_  
Probe - if needed - for second.

Are there other activities that you enjoy?

Probe - if needed - for third.

Now I am going to list several activities that some people enjoy. Please tell me how often you, or a member of your family, DOES the activity using the words:

OFTEN, SOMETIMES, RARELY, OR NEVER.

How often do members of your family . . .

SPEND TIME AT THE BEACH?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

GO CAMPING?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

Is this with a tent?

Yes\_\_\_ No\_\_\_

A camper?

Yes\_\_\_ No\_\_\_

A recreation vehicle?

Yes\_\_\_ No\_\_\_

GO SKIING?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

Is this downhill?

Yes\_\_\_ No\_\_\_

Is this cross country?

Yes\_\_\_ No\_\_\_

GO SNOWMOBILING?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

GO FISHING?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

Do you fish on lakes?

Yes\_\_\_ No\_\_\_

On streams or rivers?

Yes\_\_\_ No\_\_\_

On the ocean?

Yes\_\_\_ No\_\_\_

GO HUNTING?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

Is this bird hunting?

Yes\_\_\_ No\_\_\_

Deer hunting?

Yes\_\_\_ No\_\_\_

Other big game?

Yes\_\_\_ No\_\_\_

GO HIKING, CLIMBING, or BACK PACKING?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

Is this hiking?

Yes\_\_\_ No\_\_\_

Climbing?

Yes\_\_\_ No\_\_\_

Or back packing?

Yes\_\_\_ No\_\_\_

Do you seek out wilderness areas for this?

Yes\_\_\_ No\_\_\_

GO BOATING, CANOEING, or RAFTING?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

Is this boating?

Yes\_\_\_ No\_\_\_

Canoeing?

Yes\_\_\_ No\_\_\_

Or rafting?

Yes\_\_\_ No\_\_\_

Next I'm going to ask you to think about activities you and your family enjoy while vacationing or on other pleasure trips. I'm going to list activities, and I'd like you to answer how often you do the activity while you are traveling.

When vacationing, how often do members of your family . . .

VISIT MUSEUMS?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

PLAY GOLF?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

TRAVEL JUST TO "SIGHT SEE?"

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

VISIT A RESORT?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

[IF OFTEN OR S-T ASK:]

What is the major resort activity?

-> \_\_\_\_\_

VISIT NATIONAL OR STATE PARKS?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

TRAVEL TO SEE BIG CITIES?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

GO TO HISTORIC PLACES?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

GO OUT OF YOUR WAY TO DINE AT FINE RESTAURANTS?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

GO TO NIGHT CLUBS?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

TRAVEL LONG DISTANCES FROM HOME?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.



TRAVEL BY AIR?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

BY BUS?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

BY TRAIN?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

BY MOTORCYCLE?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

BY CAR?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

TRAVEL WITH A GROUP TOUR?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

USE TRAVEL AGENTS?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

|-----  
| [IF OFTEN OR S-T ASK:]

-> Do they help you select where to go, or how to get there?  
Where to go\_\_\_\_\_ How to get there\_\_\_\_\_

DO YOU WRITE OR CALL STATE AGENCIES FOR TRAVEL INFORMATION?

Yes\_\_\_ No\_\_\_

|-----  
| [[IF YES:]

-> Did you use this information to decide which state to visit?

| Yes\_\_\_ No\_\_\_

-> Did you use this information to decide WHAT to do in the state?

Yes\_\_\_ No\_\_\_

DO YOU READ ARTICLES OR BOOKS ABOUT PLACES YOU ARE CONSIDERING GOING?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

SEEK ADVICE FROM FRIENDS OR RELATIVES ABOUT PLACES YOU ARE CONSIDERING?

often\_\_\_, s-t\_\_\_, rarely\_\_\_, never\_\_\_.

The next question is about how you PLAN your vacation or pleasure trips.

HOW FAR IN ADVANCE OF YOUR VACATION TRAVEL DO YOU FINALLY DECIDE WHERE YOU ARE GOING? [DON'T READ RESPONSES].

Less than one month\_\_\_\_\_  
One to three months\_\_\_\_\_  
Four to eight months\_\_\_\_\_  
Nine or more months\_\_\_\_\_

Next I am going to ask a few questions about the vacation trips you, or other members of your family have taken during the last two years.

HOW MANY OUT OF STATE VACATIONS HAVE YOU, OR YOUR FAMILY TAKEN IN THE LAST TWO YEARS?

[enter number]\_\_\_\_\_

HOW MANY OF THESE WERE IN THE WINTER?

[enter number]\_\_\_\_\_

SUMMER?

[enter number]\_\_\_\_\_

HOW MANY DAYS WERE YOU AWAY FROM HOME ON YOUR LAST VACATION?

[enter number]\_\_\_\_\_

[Ask about three activities listed on page 1]

ON HOW MANY OF THESE TRIPS DID YOU \_\_\_\_\_?

[enter number]\_\_\_\_\_

[enter number]\_\_\_\_\_

[enter number]\_\_\_\_\_

DID ANY OF THESE RECENT VACATIONS INCLUDE TRAVEL IN THE ROCKY MOUNTAIN STATES?

Yes\_\_\_ No\_\_\_

DID ANY OF THESE TRIPS INCLUDE TRAVEL IN THE STATE OF MONTANA?

Yes\_\_\_ No\_\_\_

IF YES:

How many?\_\_\_\_\_

IF NO:

Have you ever been in the state of Montana?

Yes\_\_\_ No\_\_\_

PLEASE GIVE ME TWO OR THREE WORDS THAT DESCRIBE MONTANA.

[Probe for more descriptors]

---

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---

WOULD YOU SAY YOU ARE FAMILIAR, SOMEWHAT FAMILIAR, OR NOT AT ALL FAMILIAR WITH MONTANA AS A VACATION DESTINATION? (Check)

Familiar \_\_\_\_\_  
Somewhat \_\_\_\_\_  
Not at all \_\_\_\_\_

I would like to read you some statements about Montana. For each of these statements, please rate Montana using the words: EXCELLENT, GOOD, FAIR, or POOR. If you don't, please just tell me.

HOW WOULD YOU RATE MONTANA  
AS A SCENIC PLACE TO VISIT?

Excellent \_\_\_\_\_  
Good \_\_\_\_\_  
Fair \_\_\_\_\_  
Poor \_\_\_\_\_  
Don't Know \_\_\_\_\_

AS A PLACE TO GET GOOD VALUE FOR YOUR VACATION DOLLAR?

Excellent \_\_\_\_\_  
Good \_\_\_\_\_  
Fair \_\_\_\_\_  
Poor \_\_\_\_\_  
Don't Know \_\_\_\_\_

AS A PLACE WITH FRIENDLY PEOPLE?

Excellent \_\_\_\_\_  
Good \_\_\_\_\_  
Fair \_\_\_\_\_  
Poor \_\_\_\_\_  
Don't Know \_\_\_\_\_

AS A PLACE WITH INTERESTING HISTORICAL SITES?

Excellent \_\_\_\_\_  
Good \_\_\_\_\_  
Fair \_\_\_\_\_  
Poor \_\_\_\_\_  
Don't Know \_\_\_\_\_

AS A PLACE TO ENJOY OUTDOOR RECREATION?

Excellent \_\_\_\_\_  
Good \_\_\_\_\_  
Fair \_\_\_\_\_  
Poor \_\_\_\_\_  
Don't Know \_\_\_\_\_

AS A PLACE WITH A VARIETY OF VACATION ACTIVITIES?

Excellent \_\_\_\_\_  
Good \_\_\_\_\_  
Fair \_\_\_\_\_  
Poor \_\_\_\_\_  
Don't Know \_\_\_\_\_

AS A PLACE WITH GOOD RESTAURANTS?

Excellent \_\_\_\_\_  
Good \_\_\_\_\_  
Fair \_\_\_\_\_  
Poor \_\_\_\_\_  
Don't Know \_\_\_\_\_

AS A PLACE FOR A FAMILY VACATION?

Excellent \_\_\_\_\_  
Good \_\_\_\_\_  
Fair \_\_\_\_\_  
Poor \_\_\_\_\_  
Don't Know \_\_\_\_\_

HOW WOULD YOU RATE MONTANA'S

MOTEL AND HOTEL ACCOMMODATIONS?

Excellent \_\_\_\_\_  
Good \_\_\_\_\_  
Fair \_\_\_\_\_  
Poor \_\_\_\_\_  
Don't Know \_\_\_\_\_

MONTANA'S CLIMATE

Excellent \_\_\_\_\_  
Good \_\_\_\_\_  
Fair \_\_\_\_\_  
Poor \_\_\_\_\_  
Don't Know \_\_\_\_\_

AS A PLACE FOR REST AND RELAXATION?

Excellent \_\_\_\_\_  
Good \_\_\_\_\_  
Fair \_\_\_\_\_  
Poor \_\_\_\_\_  
Don't Know \_\_\_\_\_

AS A PLACE THAT'S EASY TO GET TO FROM YOUR HOME?

Excellent \_\_\_\_\_  
Good \_\_\_\_\_  
Fair \_\_\_\_\_  
Poor \_\_\_\_\_  
Don't Know \_\_\_\_\_

AS A PLACE TO \_\_\_\_\_ [Ask about three activities from page 1]

Activity 1:

Excellent \_\_\_\_\_  
Good \_\_\_\_\_  
Fair \_\_\_\_\_  
Poor \_\_\_\_\_  
Don't Know \_\_\_\_\_

Activity 2:

Excellent \_\_\_\_\_  
Good \_\_\_\_\_  
Fair \_\_\_\_\_  
Poor \_\_\_\_\_  
Don't Know \_\_\_\_\_

Activity 3:

Excellent \_\_\_\_\_  
Good \_\_\_\_\_  
Fair \_\_\_\_\_  
Poor \_\_\_\_\_  
Don't Know \_\_\_\_\_

HOW WOULD YOU RATE MONTANA AS AN OVERALL PLACE TO TAKE A VACATION?

Excellent \_\_\_\_\_  
Good \_\_\_\_\_  
Fair \_\_\_\_\_  
Poor \_\_\_\_\_  
Don't Know \_\_\_\_\_

Now I am going to ask you several things about a potential vacation in Montana. If you were to take a vacation in Montana:

HOW MANY DAYS WOULD IT TAKE YOU TO DRIVE FROM YOUR HOME DIRECTLY TO MONTANA?

[enter number] \_\_\_\_\_

HOW LONG WOULD THAT VACATION BE?

[enter number of days] \_\_\_\_\_

WOULD THE TRIP ON THE WAY TO MONTANA BE ENJOYABLE OR NOT ENJOYABLE?  
[check one]

Enjoyable \_\_\_\_\_

Not Enjoyable \_\_\_\_\_

WOULD YOU VACATION MAINLY IN MONTANA OR JUST TRAVEL THROUGH ON YOUR WAY TO  
SOMEWHERE ELSE?

Montana \_\_\_\_\_

Somewhere Else \_\_\_\_\_

WOULD YOU GO DIRECTLY TO MONTANA OR STOP TO SIGHT SEE AT MANY PLACES ALONG  
THE WAY?

Go Directly \_\_\_\_\_

Sight See \_\_\_\_\_

WHAT SINGLE THING DO YOU THINK YOU WOULD ENJOY MOST ABOUT VACATIONING IN  
MONTANA?

---

WHAT SINGLE THING DO YOU THINK YOU WOULD ENJOY LEAST ABOUT VACATIONING IN  
MONTANA?

---

Now I am going to ask you about the CHANCE that you will go to some travel  
destinations. Please respond using the words:

VERY HIGH, HIGH, LOW, OR VERY LOW.

WOULD YOU RATE THE CHANCE YOU WILL TRAVEL TO YELLOWSTONE NATIONAL PARK IN  
THE NEXT TWO YEARS AS - VERY HIGH, HIGH, LOW OR VERY LOW?

Very High \_\_\_\_\_

High \_\_\_\_\_

Low \_\_\_\_\_

Very Low \_\_\_\_\_

PLEASE RATE THE CHANCE THAT YOU WILL TRAVEL TO GLACIER NATIONAL PARK IN THE  
NEXT TWO YEARS.

Very High \_\_\_\_\_

High \_\_\_\_\_

Low \_\_\_\_\_

Very Low \_\_\_\_\_

PLEASE RATE THE CHANCE THAT YOU WILL TRAVEL TO MONTANA IN THE NEXT 2 YEARS.

Very High \_\_\_\_\_  
High \_\_\_\_\_  
Low \_\_\_\_\_  
Very Low \_\_\_\_\_

Finally, I would like to ask a few background questions so that we can group your answers with those of similar people. Your answers will only be used for statistical purposes and will be held in strict confidence.

WOULD YOU CALL THE AREA WHERE YOU LIVE RURAL OR URBAN?

Rural \_\_\_\_\_  
Urban \_\_\_\_\_

PLEASE TELL ME HOW MUCH FORMAL EDUCATION YOU HAVE HAD?

[Don't read responses, Check One]

Less than high school? \_\_\_\_\_  
High School Graduate? \_\_\_\_\_  
Some College? \_\_\_\_\_  
College Graduate? \_\_\_\_\_  
Graduate School? \_\_\_\_\_  
Technical School? \_\_\_\_\_

WHAT IS YOUR MARITAL STATUS?

[Don't read responses, Check One]

Single? \_\_\_\_\_  
Married? \_\_\_\_\_  
Divorced or Separated? \_\_\_\_\_

HOW MANY CHILDREN ARE LIVING WITH YOU?

None \_\_\_\_\_  
One \_\_\_\_\_ How old is the child? [Enter Age] \_\_\_\_\_  
If Two or More, enter number and ask: \_\_\_\_\_  
What is the age of the youngest? [Enter Age] \_\_\_\_\_  
What is the age of the oldest? [Enter Age] \_\_\_\_\_

HOW MANY PEOPLE, INCLUDING YOURSELF, YOUR FAMILY, AND OTHER TRAVEL COMPANIONS, DO YOU NORMALLY TRAVEL WITH?

[Enter number] \_\_\_\_\_

WHAT IS YOUR OCCUPATION?

Professional, Technical \_\_\_\_\_  
Managers, Officials or Proprietors \_\_\_\_\_  
Clerical and Related \_\_\_\_\_  
Sales and Related \_\_\_\_\_  
Craftsmen \_\_\_\_\_  
Student \_\_\_\_\_

Operatives \_\_\_\_\_  
Service \_\_\_\_\_  
Unskilled Nonfarm \_\_\_\_\_  
Farm and Farm Mgrs. \_\_\_\_\_  
Housewife \_\_\_\_\_  
Retired \_\_\_\_\_

DOES ANY OTHER MEMBER OF YOUR HOUSEHOLD WORK?

Yes \_\_\_\_ No \_\_\_\_

[If no, Skip]

WHAT DO THEY DO?

Professional, Technical \_\_\_\_  
Managers, Officials or Proprietors \_\_\_\_  
Clerical and Related \_\_\_\_  
Sales and Related \_\_\_\_  
Craftsmen \_\_\_\_  
Student \_\_\_\_

Operatives \_\_\_\_  
Service \_\_\_\_  
Unskilled, Nonfarm \_\_\_\_  
Farm and Farm Mgrs \_\_\_\_  
Housewife \_\_\_\_  
Retired \_\_\_\_

WHAT IS YOUR AGE?

[Enter Age] \_\_\_\_

I am going to list some income ranges. Please say yes when I get to the range that includes the total income of all family members.

Less than \$20,000 \_\_\_\_  
More than 20 but less than \$30,000 \_\_\_\_  
More than 30 but less than \$40,000 \_\_\_\_  
More than 40 but less than \$50,000 \_\_\_\_  
More than \$50,000 \_\_\_\_

Thank you very much for your time and cooperation. The state of Montana will use the information you have provided to help people plan their vacations and make travel in the state more enjoyable for all.

If you would like to know more about Montana, we would be happy to send you information.

Would you like to receive a free Montana vacation planning packet?

[If yes]

What is your name please \_\_\_\_

What is your address? \_\_\_\_

Record sex of respondent: Male \_\_\_\_ Female \_\_\_\_

Record:           Region # \_\_\_\_  
                  Replicate \_\_\_\_  
                  Rep Page \_\_\_\_  
                  Area Code \_\_\_\_  
                  Phone # \_\_\_\_  
                  MSA # \_\_\_\_  
                  St/County # \_\_\_\_  
                  Date \_\_\_\_



APPENDIX II

SSI Job: 06315 Study  
Random Digit Super Sample

Prepared for  
Montana State University

June 27, 1984

## Survey Sampling, Inc.

SHIPPING ADVICE FOR SSI JOB: 06315

June 27, 1984

Mr. William F. Muhs, D.B.A.  
Associate Professor  
Montana State University  
School of Business  
Bozeman, MT 59717

This Federal Express shipment contains the SSI Random Digit Super Sample ordered June 22, 1984 for your SSI Job: 06315 study.

As per the sampling specifications, the sample is formatted on Magnetic Tape and One Computer Manuscript, and broken out as follows:

AREA DEFINITION AND MARKET	SAMPLE TYPE	REPLICATES		TOTAL
		QUANTITY	SIZE	
01 Region I	RDSUPR	10	120	1200
02 Region II	RDSUPR	10	120	1200
03 Region III	RDSUPR	10	90	900
04 Region IV	RDSUPR	10	90	900
05 Region V	RDSUPR	10	120	1200
06 Region VI	RDSUPR	10	90	900

RDSUPR: Random Digit Super Sample

## DESCRIPTION OF SAMPLING PROCEDURES

## STRATIFICATION TO COUNTIES

To equalize the probability of telephone household selection from anywhere in the area sampled, samples are first systematically stratified to all counties in proportion to each county's share of telephone households in the survey area. To obtain reasonable estimates of telephone households by county, Survey Sampling developed a special data base, beginning with 1980 census data for residential telephone incidence. These counts, updated yearly with data on new telephone installations provided at the state level, are then applied to current projections of households by county, published annually by Sales & Marketing Management magazine.

After a geographic area has been defined as a combination of counties, the sum of estimated telephone households is calculated and divided by the desired sample size to produce a sampling interval.

**Example:**

$$\frac{\text{(total estimated telephone households)} \quad 750,000}{\text{(desired sample size)} \quad 6,000} = 125 \text{ (INTERVAL)}$$

A random number is drawn between 0 and the interval (125) to establish a starting point. Assuming the starting point is 86, then the 86th, 211th, 336th, 461st, etc. records would be selected for the sample, each time stepping through the data base by a factor of 125. This is a systematic random sample — as the sample is selected in a systematic "nth" fashion from a random starting point. Any county whose population of estimated telephone households equals or exceeds the sampling interval is automatically included in the sample, while smaller counties are included with a probability proportionate to their size.

Using our example, where the sample size is 6,000, let us also assume that the geographic area selected covers three counties.

**Example:**

*The sampling interval allows the proportionate distribution of the sample over three counties as follows:*

	Total Households	% With Phone	Estimated Phone Households	% of Sample
Cour. A	223,404	94	210,000	28.0
County B	393,258	89	350,000	46.7
County C	204,301	93	190,000	25.3
	820,963		750,000	100.0

Survey Sampling, Inc.

June 27, 1984

William F. Mohs, D.B.A.  
Associates Professor  
Montana State University  
School of Business  
Bozeman, MT 59717

Dear William:

Enclosed is the SSI Random Digit Super Sample requested on 6/22/84. The attached information details the sampling specifications.

You will be pleased to know that the numbers included in your sample will not be reused for at least one year. Because all our samples are protected, we can assure you confidentiality and fresh respondents--ones who are not being repeatedly asked to participate in studies. And although we obviously can't guarantee your respondents won't be contacted through some other sampling method, as the established leader in sampling, our commitment to protection will significantly increase your chances of reaching people who are willing to cooperate in your research.

In addition, we can now guarantee that all business telephones listed in the Yellow Pages have been removed from your SSI Random Digit Super Sample. By matching the sample against our own data base of 8.4 million Yellow Page listings, we are able to eliminate those numbers from consumer samples. Since about seven percent of the numbers generated in a random digit sample usually fall into this category, you are effectively receiving that many more potential residential numbers. The net result represents greater efficiency and cost-effectiveness in conducting your study.

Should you have any further questions regarding your sample, please let us know. In the meantime, we thank you for the order and look forward to working with you again.

Best regards,

Mark Lamb  
Account Executive

### SELECTION OF NUMBERS WITHIN COUNTIES

For each county included in the sample, one or more unique telephone numbers is selected by systematic sampling from among all working blocks of numbers in all telephone exchanges assigned to the county. A working block is defined as 100 contiguous numbers containing three or more residential telephone listings.

**Example:**

the phone number 226 - 7558

exchange    block

And in this example, for the exchange 226, the entire block comprises the numbers 7500-7599. Exchanges are assigned to a single county on the basis of where listed residents live. Nationally, about 80 per cent of all exchanges appear to fall totally within county boundaries. For those overlapping county lines, the exchanges are assigned to the county with the highest number of listed residents.

### SELECTION AMONG EXCHANGES

Once the sample has been allocated, a second sampling interval is calculated for each county by dividing the number of listed telephone households for the county by the portion of the sample allocated to that county. In our earlier example, it was determined that 28 per cent of the sample (1,680 numbers) would be drawn from County A. Each exchange and working block within an exchange are weighted by their share of listed telephone households. If the total number of listed telephone households in the data base for this county is 159,600, then that number divided by 1,680 gives us an interval of 95.

Next, from a random start between 1 and 95, those exchanges and working blocks falling within the interval are sampled on a systematic basis. If a random digit sample is required, two more digits randomly chosen from the range 00-99 would then be added to each of the blocks selected. The result is a complete number made up of the exchange, the block, and the two random digits (e.g., 226 + 75 + 58). In the case of a listed sample, only listed households are selected.

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the phone number 226 - 7558  
                    □     □  
                    exchange   block

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